

Title Partnerships- Cracking under the
 pressure of organizational change?

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ABSTRACT

The concept of partnership and its success or failure has attracted much debate since its inception as a model in the early 1990s. It has become apparent that partnership can entail changing deeply held beliefs and attitudes on both the management and union sides of the relationship. The pace of change has increased exponentially in recent times, necessitating new organisational responses. These responses can be seen by some as sympathetic to the development of partnership work, but at the same time it is acknowledged that organisational change can become a pressure on partnership.

The purpose of this research is to look at existing partnerships as they experience the pressures of organisational change over a period of time, and analyse the effect these pressures have on both managers and union representatives, the partnership itself, and the success of organisational change. Extrapolated from key literature, theoretical models were developed to demonstrate the changes in partnership.

Using an explanatory causal comparative case study approach, across two organisations; the Nottinghamshire Healthcare NHS Trust; and the Royal Mail. The research uses primary and secondary data obtained through a series of semi-structured questionnaires completed by key leads involved in the partnership, on both the union and management sides; and study of academic and professional literature with a key focus on both partnerships in the subject organisations. The resulting data was analysed using a matrixed pattern matching technique.

The research identifies that there are many influences involved in the deterioration, or stability of partnership: whether the approach to the creation of partnership is cynical or positive; whether management and union attitudes are allowed to deteriorate, or the partnership seeks for ways to overcome these pressures; the strength of the partnership does help it to endure, but there are contributing factors to this strength, such as the embedding of partnership, and equal voice to management.

The research concludes that partnership does not necessarily deteriorate under the pressure of organisational change, but rather establishes that they can survive these pressures through a focused application of partnership strategy on both the management and union sides. The existing typologies for definition of the strengths of partnership were demonstrated to have neglected the wider more complex variables existing that make a partnership weak or strong, and rather that the theoretical models proposed, demonstrated a more valid theory of this complex environment and therefore could be said to demonstrate what occurs to partnerships enduring the pressures of organisational change, and therefore could be used for prediction purposes. It is suggested that this presents an opportunity for further research focused on the stability of partnership, utilising the validated models proposed herewith.

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ACKNOWLEDGEMENTS

I would like to thank the following people for supporting me throughout the completion of this dissertation and the associated research and making it possible:

- My husband – John; without whose support, patience and physical therapy for my exhausted arms, completion of this dissertation would have proved impossible.
- Dr Frank Carr; his provision of guidance and help throughout has been greatly appreciated and in particular, his generosity with his time.
- The Healthcare Commission, and in particular Mick Linsell; for their ongoing support of my studies in the form of encouragement and provision of study leave.
- Derek Luckhurst and Robert Stevens of the Involvement and Participation Society; for their expertise and advice in support of the selection of case study organisations.
- Norman Wilson and all questionnaire respondents of the NHS Nottinghamshire NHS Trust; without whose support and contribution I would not have been able to analyse the partnership.
- Tracey Hammond and all questionnaire respondents of the Royal Mail; without whose support and contribution I would not have been able to analyse the partnership.
- Mel Madeley; without whose mentorship over the last three years, I could not have started on this immense journey.

LIST OF ABBREVIATIONS

CBI – Confederation of British Industry

CEEP - European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest

CMA – Communication Managers Union, part of Amicus – now UNITE

CWU – Communication Workers Union

DRAW – Dignity and Respect at Work (Royal Mail work strand)

EU – European Union

EIRO – European Industrial Relations Observatory

GMB – Britain's General Union

HRM – Human Resource Management

IPA – Involvement and Participation Association

TGWU – Transport and General Workers Union

TUC – Trade Union Congress

UCATT – Union of Construction, Allied Trades and Technicians

UNISON – Britain's biggest Trade Union

UNITE – a union recently created by the merger of Amicus, AEEU, MSF and GPMU.

UK – United Kingdom

1. INTRODUCTION

1.1. Aims Of Dissertation

The concept of partnership and its success or failure has attracted much debate since its inception as a model in the early 1990s (Kelly 2004; Knell 1999; Bacon & Storey 2000; Bryson 2001). It is seen as a means of harnessing the energies and commitment of both unions and employees to support and develop the organisation and its business i.e. shared commitment; and thereby moving away from the adversarial model of the past to the creation of harmonious union/employer relations where gains are mutual. It has become apparent since the first wave of enthusiasm, that partnership working can entail changing deeply held beliefs and attitudes on both the management and union sides of the relationship. The potential for attitudes to change is reliant on the drivers that exist behind the creation of the partnership, such as management cynically entering into partnership purely to enable the implementation of organisational change; the inter-relationships of managers and union representatives, and more importantly the degree to which they trust each other e.g. If trust does not exist or disappears, the partnership can begin to breakdown which can result in a deteriorating employee relations climate and a disenchanted workforce. It could therefore be argued that successful partnership is a complex and potentially fragile balance that could be upset by pressures from a wide range of sources. One of the key sources of pressure for partnerships is organisational change, as it can frequently compromise the employment security and relationship-building components of the partnership approach (Reilly 2001; Knell 1999).

The pace of change has increased exponentially in recent times with the pace of globalisation increasing with developments in technology and cultural homogenisation and the expansion and increased competitiveness of markets. (Burke & Cooper 2004). This accelerating pace of change has caused organisational environments to become increasingly turbulent as the result of more rapid change, creating more complex problems and greater unpredictability of what will happen in the future (Burke & Cooper 2004). This has necessitated new organisational responses, from the development and implementation of high performance work practices and self-managed teams (Knell 1999), to the harder aspects of organisational change such as mergers, acquisitions and downsizing (Burke 2002). These changes that an organisation makes in response to this accelerating pace of change can be seen by some as sympathetic to the development of partnership at work (Knell 1999), as partnership has been identified as a enabler for the introduction of such practices and management techniques, and is seen as an employer-union model that commits to the success of the organisation

(Guest & Peccei 1998; Knell 1999). At the same time it is acknowledged that organisational change can become a pressure on partnership (Reilly 2001), deteriorating the relationships between managers and union representatives. Employee attitudes can also pressurise partnership with the effects of change, as employees may lose faith in their union representation and ultimately the partnership, particularly if the change results in downsizing, closure or redundancies. Clearly these widely differing perspectives present a dichotomy of opinion.

1.2. The Importance Of Partnership

Unions had experienced declining Trade Union power through Conservative Governments from 1979 to 1997. This was achieved by making secondary industrial action illegal, forcing the abolition of the closed shop, with further laws banning workplace ballots and imposed postal ballots. With this 'rolling back' of regulatory frameworks, which included restriction and regulation of Trade Union immunity in trade disputes and removal of statutory support for collective bargaining (Smith and Morton 2006), a decline was evidenced in overall union recognition from 66 per cent in 1984 (Cully et al 1998) to 30 per cent in 2004 (Kersley et al 2004) linked with declining membership and with unions experiencing increasing marginalisation (Bacon and Blyton 2006).

Following the election of 'New Labour' in 1997, the Trade Unions had hopes of the new Government reversing this situation and re-establishing some of the powers that Trade Unions had lost; however this hope was quashed with the Government publishing the White Paper entitled 'Fairness at Work' (DTI 1998), with the express statement that " There will be no going back. The days of strikes without ballots, mass picketing, closed shops and secondary action are over (1998:2)." Its stated aim in its foreword by Tony Blair was to "replace the notion of conflict between employers and employees with the promotion of partnership." (1998:2). This 'boosting' of the partnership approach, by the Labour Governments election; personal endorsement by Tony Blair; and introduction of the Employment Relations Act 1999, introducing new rights for individuals and Trade Unions, was intended to instigate cultural change in industrial and employee relations in the workplace.

The push for the partnership approach continued with both Government funding via the Partnership Fund in 1999 (with £12.5m committed to 31st March 2004), and economic factors, such as a tighter labour market, have encouraged both organisations and unions to contemplate the notion of partnership as the new way forward for employee relations (Oxenbridge & Brown 2002). Additionally since the UK's signature of the 'social chapter' and its incorporation into the Treaty of Amsterdam in 1997, the EU's preference for consultation has migrated to the UK via the establishment of EU led employment law since 2004 and the

promotion of social partnering by organisations such as CEEP. Together these factors have had a profound effect on employment relations in the UK, the combined result being a booming 'partnership industry' with high levels of employer/union partnership creation (Terry 2003), with more than 700 in 2000 alone (IRS 2000: 3)

The partnership concept was not universally accepted, with dissenting voices being heard early on from within the Confederation of British Industry (CBI) and Trade Union Congress (TUC), over whether partnership was the preferred arrangement (Bacon and Storey 2000). The CBI are generally supportive of partnership but don't prescribe that this necessarily should involve Trade Unions, preferring instead to support the creation of direct partnerships between employer and employees. The TUC are supportive of partnership where it involves Trade Unions as the independent voice of the employee and are concerned with the trend of promotion of partnership in the absence of unions (EIRO 1999), and accordingly launched a Partnership Institute, providing consultancy and advisory services to unions and employers in 2001 (Terry 2003).

Critics of union involvement of partnership arrangements believe that it is likely that cooperative relations gains will be secured disproportionately on the side of management (Bacon and Blyton 2006), and as a consequence unions run the danger of losing membership support, by their inability to demonstrate effective opposition to management. Others have suggested that "New Labour seek to domesticate, rather than exclude, workers voice through promotion of co-operative Trade Unionism"; and that partnership agreements entrench employers' power (Smith and Morton 2006); partnership agreements contribute to union weakness by reinforcing a concept of common interests, which weakens the need for independent union representation for employees (Kelly 2004).

From supporters of partnership we hear that for some Trade Unions it has presented an opportunity to develop a relationship with management based on cooperation, and thereby provides a means to regain involvement in decision making (Bacon and Blyton 2006). There are some supporters that argue that these arrangements may have protected unions against even more severe membership loss by reducing the employers incentive to de-unionise and thereby, eliminate the Trade Unions in the workplace (Kelly 2004). Others state that partnership approaches may prove to be an important part of UK businesses adaptation to the demands of the new information and technology age and increasingly competitive world markets (Kelly 2004). However, there is some evidence of the fragility of partnerships. For example Bacon & Storey (2000) failed to find evidence that the organisations in their study negotiated partnerships that were likely to be stable in the long term; Heaton, Mason & Morgan (2000) showed that some management appeared to exploit the tensions existing between shop stewards to further their objectives leading to heightened misunderstanding

that resulted in union based conflict; and Reilly (2001) demonstrating that partnerships can come under pressure from organisational change.

Despite reports of high levels of partnership creation in 2000 (IRS 2000:3), by 2001, the TUC reported that there were only 60 bona fide partnership arrangements in existence, despite the Governments and TUC support and promotion of the concept. Some academics (Kelly 2004; Heery 2002; Deakin et al 2004) have suggested that this may be due to significant constraints to the spread of partnership arrangements in the UK, such as the volatility in product markets inhibiting the degree of long term planning, which in turn can effect job security; unions' membership becoming negative towards partnership and the necessity for high trust relationships to exist within partnerships, in order for mutual gains to appear.

1.3. Objectives And Aims

The focus of this research is on existing partnerships as they experience the pressures of organisational change over a period of time, and to analyse the effects these pressures have on both managers and union representatives, the partnership itself, and the success of the organisational change. Although plentiful research exists on many aspects of partnership, the importance of this research is to examine whether it is inevitable for partnerships to deteriorate under these pressures or whether interventions and good partnership management/working can negate these pressures and carry forward the partnership in a healthy condition to the completion of organisational change.

1.4 Objectives

In particular this empirical study will focus on the following objectives:

- A comparison of organisations' partnerships as they experience the pressures of organisational change over time
- A comparison of each organisations' management approach to the creation of partnership and the circumstances surrounding its creation
- A comparison of the management and union attitudes prior to and following organisational change
- A comparison of the effects of the partnership on improvement of the management of organisational change

1.5 Hypotheses

The main emphasis of this research is the challenges that UK employer-union partnerships undergo during organisational change with regard to the following hypotheses:

1. Employer-union partnerships will inevitably deteriorate under the pressure of organisational change
2. A major cause of this deterioration will be the misuse of the partnership concept by employers to fast-track organisational change
3. Manager and union attitudes to partnership will deteriorate under the pressure of organisational change, and this deterioration will be a contributing factor to the deterioration of the partnership
4. The stronger an employer-union partnership is, the more robust to organisational change deterioration it will prove

This dissertation aims to describe some of the academic debate surrounding partnership in the UK, and examine the pressures that can affect partnership negatively and the problems associated with failing partnerships in an organisational change climate. It also aims to propose a theoretical model to identify and explain the variables involved in the deterioration of partnerships experiencing organisational change, and to test the hypotheses of this study.

1.6 Purpose Of The Research

The aim of this research is to examine partnerships in organisations that have experienced organisational change, as one of the most enduring tests of partnership relations, and establish how effectively those relationships can survive significant organisational change, such as redundancies, merger, acquisitions and implementation of radically different work practices. Debates around partnership and organisational transformation have increased in recent times due to the increased need for successful organisational transformation with workplace innovation and cultural shifts.

In order to test this thesis, two partnerships from two very different organisations have been selected which have endured organisational change. These will be analysed to compare and contrast the partnerships to crystallise their differing levels of success and strength. The main research emphasis is how management and union representatives' attitudes react and change over time, whilst undergoing varying types of organisational change. An area of particular interest is the impact these changing attitudes have on the organisational success or failure of the particular changes in question, and on the robustness of the partnership itself.

For the purposes of this research the empirical data analysed will be restricted primarily to the shared views of the managers and union representatives, although secondary data, sourced from academic and professional publications will be utilised to illuminate the partnership and organisation further.

1.7 Research Method Used

Using primarily literature based research materials as the key resource, the investigation will take the form of an explanatory causal comparative case study involving two organisations and their respective employer-union partnerships. An explanatory causal comparative case study was chosen as the most likely design model to demonstrate effectively the progress of organisational change over time within an organisation (over the last 7 years of the partnership), and its effects on the existing partnership. Additionally it has the benefit of being practical in light of time and cost restraints. The organisations selected for investigation consist of the Royal Mail and Nottinghamshire Healthcare NHS Trust, who were selected due to the existence of public domain academic and professional literature on these partnerships and their development; additionally these organisations have both experienced significant organisational change.

The Involvement and Participation Association (IPA) have aided selection of relevant case studies for this research and in the IPAs opinion the case study organisations chosen reflect a wide spectrum of partnership, from the strong and successful at Nottinghamshire Healthcare NHS Trust, to the damaged and weak at Royal Mail. For the purposes of this research, however, it is necessary to utilise a more proven definition of the strength or weakness of partnership, and therefore the 'robust/shallow' typology of partnership defined by Oxenbridge and Brown (2004) has been selected, where 'robust' partnerships confer a wide range of benefits on both parties and 'shallow' partnerships provide substantially fewer benefits for the union.

2. LITERATURE REVIEW

This chapter covers a review of the extensive literature on employer-union partnership and by this exercise consideration will be given regarding how organisational change can affect partnership.

This will include examination of critical issues such as partnership as an alternative to employer-union conflict; the 'fit' of partnership into employee relations and human resource management (HRM) theories; examination of the benefits of partnership for both employer and unions; theoretical models of change and how change can affect union attitudes and employee needs and fears and an analysis of how partnership can work at different levels from board to 'shop floor' and how this can effect how likely change is to occur.

2.1 Definitions Of Partnership

There are various definitions of partnership in existence. Larry Adams, an American consultant who specialises in helping the creation of employer-union partnerships, succinctly describes partnership as, "A partnership is an interest based relationship – that is, a relationship based not on simply power or rights but on the satisfaction of mutual as well as separate interests" (Reilly 2001:5). The TUC has put forward "six key principles of partnership:

- Shared commitment to the success of the enterprise
- Recognition of legitimate interests
- Commitment to employment security
- Focus on the quality of working life
- Openness
- Adding value

(TUC 2001:3), and the language used within these TUC principles is dramatically different from the language used by unions in analysing their relationships with management 20 years ago (Terry 2003:464).

The IPA has had an evolving definition of partnership; initially in 1992 the IPA identified 3 commitments which they believed all parties needed to subscribe to, to create a partnership; "the success of the enterprise; building trust through greater involvement; and, respect for the legitimacy of other partners" (IPA 2004:6); and four building blocks of partnership – "recognition of employees' desire for security and the company's need to maximise flexibility; sharing success within the company; informing and consulting staff about issues in the workplace and company level; and, effective representation of people's views within the

organisation”(IPA 2004). Guest & Peccei (1998) state that partnership is based upon three commitments; to the success of the organisation; to trust and employee involvement; and, to the legitimacy of everyone’s role; and four building blocks - the balance of competing desires for employment security and employee flexibility; sharing success; informing, consulting and informing staff in the workplace; and, providing representation of employees. Additionally Kelly (2004:268) suggests that partnership has three core components, “flexibility, union rights to consultation over strategic business decisions and undertakings to employees about job or employment security.”

Although the definitions vary, there are common themes emerging from these differing perspectives of partnership. The two key elements of any partnership approach are, one, that it is based on mutuality i.e. both sides recognising areas of commonality and shared interest, for example – the success of the enterprise; and two, that it is critical that there is an acceptance of plurality i.e. recognising areas of difference, for example, an employee’s need for job security versus the management’s aim of achieving flexibility (Reilly 2001). Additionally most commentators seem to agree that the concept is focused on an attempt to shift away from the adversarial relationships towards a more cooperative, high-trust mutual gains relations (Johnstone undated).

2.2 Partnership As An Alternative To Employer-Union Conflict

Following the election of ‘New Labour’ in 1997, the Government’s ‘Fairness at Work’ programme and the Employment Relations Act (1999) introduced new rights for individuals and trade unions (DTI 1998), which aimed to “replace the notion of conflict between employers and employees with the promotion of partnership in the long term” (DTI 1998:2). The Government pursued this goal with the underlying driver that harmonious employee relations based on partnership improved working lives for individuals and the success of organisations (Bryson 2001) and specifically to “ build a fair and prosperous society in the UK based on a strong and competitive economy.... So that the Britain can harness the talents of all our people.” (DTI 1998:2). The Government further supported the adoption of partnership by funding via the Partnership Fund, as previously mentioned, and development and provision of ACAS guidance. These interventions have been given greater impetus by the prevailing economic situation with labour market tightness, causing organisations to work harder to secure and retain employees (Reilly 2001).

The notion of social partnership was first seen following the discussions between business leaders and the TUC following the General Strike of 1926. The scale of the General Strike had acted as a catalyst for the consideration of a mechanism for consultation between management and trade union representatives. Historically these discussions were known as the Mond-Turner talks (TUC 2007), where they are clearly recognising the differing interests of management and employees, but wishing to establish a basis for cooperation i.e. a pluralist approach. The pluralist perspective recognises that management and unions have differing positions in some areas, and that conflict will exist at times, but there is a potential to identify and share common ground (Hollinshead et al 2003:14). Partnership, as it has evolved has tended to organise around the pluralist perspective, but with a focus on the areas of common ground that can be established; rather than taking a unitary perspective, where there would be an attempt to eradicate all conflict and differences (Hollinshead et al 2003:10). Some cynics of partnership have inferred that the Government promotion of partnership is an attempt to weaken union power by organisations using partnership to move industrial relations from a pluralist to unitarist balance (Kelly 2004; Smith & Morton 2006), but academic opinion differs widely on this subject.

Although the Governments partnership concept was not specifically orientated towards employer-union partnership, it was a concept that was enthusiastically grasped by some unions as it was believed that it could be a lever for supporting trade union renewal, following the membership and density decline of recent times (Cully et al 1998; Kersley et al 2004), and therefore presented a possibility that partnership could act as a resurrection mechanism. For example, (Ackers & Payne 1998:546) believe that partnership provides a vehicle for union renewal, which will enable unions to "swim among the fishes, and re-enter the mainstream of employment relations". Other academics (Kelly 2004; Martinez Lucio & Stuart 2000; Smith & Morton 2006) warn that partnership agreements may serve to undermine workplace unionism and weaken the union movement as a whole. Kelly (2004:288) finds that unions have not experienced increased success via partnership at improving jobs and wages than they were under conventional non partnership arrangements and additionally that increases in union membership and density had come via membership organising campaigns rather than via a partnership approach. Martinez Lucio & Stuart (2000:413) note that the rationale behind partnership is to enable industrial relations to move from a zero to a positive sum game that is beneficial to all sides. Their studies found (2000:415) that the practice of partnership may inevitably involve concessions by unions in return for guarantees of employment security and a role in a decision making structure. Additionally the balance of evidence for partnership outcomes (2000:417) seemed to be focused on shrewd bargaining rather than there being genuine partnership at work. Smith & Morton (2006:414) go further by stating that " partnership agreements entrench employers' power", without a true balance of mutuality and employer dominant agreements.

There is certainly evidence that suggests that many partnership arrangements may appear out of crisis in employee relations, or, more commonly, business crisis, with the rationale behind the new approach being that change is required or business failure will be the result, as can be seen in Kelly (2004:270) and Knell (1999:17-18). These studies demonstrate that many partnerships have been introduced in heavily unionised businesses going through substantial restructuring and headcount reduction and some have been triggered by severe industrial conflict that has led the business and unions to attempt to construct a newer cooperative platform. For others it is about developing an effective change programme because without trade union support, change would be impossible to deliver (Reilly 2001:9; Knell 1999:18). For example Munro (2002:282) reports how one NHS Trust approached employer-union partnership in order to facilitate change the key driver for which was the need to respond to Government.

Some partnership deals do have more positive beginnings where they build on existing trust and openness to further develop their employee relations strategies (Knell 1999:18), or there is a realisation that the present approach is not suitable for the present time and in order to meet the business goals. For example, Airbus UK (Reilly 2001:9) approached partnership to improve its employee relations approach in order to realise new business growth targets, and Tesco introduced partnership (Reilly 2001:10) in order to bring about higher productivity and employee engagement and to enhance the employer brand. However, on the whole it is evident that predominantly, partnership is prompted and led by business management, rather than union or employee initiative (Knell 1999:17; Reilly 2001:10).

2.3 Partnership, Employee Relations And Theories Of HRM

In the mid 1980s, a rising interest in human resource management (HRM) developed simultaneously with the declining profile of industrial relations. This was caused by the then Conservative Government's sustained attack on unions and their power via the introduction of legislation (Guest 1995:111). The legislation was designed to limit the power of unions and move them to the periphery of corporate concern, underpinned with a Government thrust to create a market economy. The models of HRM which had derived from America were drawn mainly from non-union firms, and identified three main bases for competitive advantage (Porter 1980; Miles & Snow 1978; Miles & Snow 1984); market leadership based on innovation; quality; and cost – all of which are required for a successfully committed workforce and therefore, a strong psychological contract. It is this aspect that is at the core of HRM strategies and is the differentiating factor between HRM and personnel management/industrial relations systems (Guest 1995:112). Commitment was seen as key for several reasons; committed employees will 'go the extra mile', creating greater productivity; they are likely to exercise autonomy and self regulation, reducing supervisory

need thereby creating efficiencies; employees are more likely to stay with the same employer for longer, which increases the return on investment; and, working with an assumption that a committed employee will be unlikely to become involved in industrial relations (Guest 1995:113).

Academics reflecting a pro HRM background have seemed primarily concerned with development of the psychological contract as the route to commitment and trust, while those whose research predominates on 'partnership' see these benefits as being primarily generated in unionised environments (Sisson 1999). This is despite the fact that the government and business affiliated organisations, such as the CBI, suggest that partnership does not necessarily involve unions, and can be developed in both unionised and non-unionised businesses.

Guest (1995) found that there were four policy choices facing organisations with respect to HRM and industrial relations – The New Realism; Individualised HRM; Traditional Collectivism; and; The Black Hole.

Table 2.1 - Employment Relations policy choices (Guest & Conway 1999:368)

		HRM priority	
		High	Low
Industrial relations priority	High	The new realism	Traditional Collectivism
	Low	Individualised HRM	The Black Hole

In Guest & Conway (1999) these models are examined further and a correlation was discovered between organisations where there was a high take-up of HRM and a union presence ('the new realism'). Here there were more positive attitudes than in 'black hole' organisations, although the 'individualised HRM model' did produce the highest levels of commitment and positive attitudes overall (Guest & Conway 1999:384). Further analysis revealed that the HRM practices were a greater contributor towards these positive behaviours, than a union presence, and that this was largely due to the strength of the psychological contract, which unions did little to contribute to, and that generally, where unions had an impact on attitudes and experiences, that these were generally negative (Guest & Conway 1999:384). This evidence suggested a need to examine the relationship between HRM and industrial relations and the role of trade unions in this market driven economy, and in particular, within the concept of commitment, to establish the feasibility of dual commitment for employees to both company and union.

The logic of market driven HRM strategy is that unions are irrelevant where high commitment is sought (Guest 1995) due to evidence that suggests that where cost advantage is the goal;

unions and industrial relations appear to carry high costs. However, HRMs focus is commitment i.e. the winning of hearts and minds of employees – by making the company's goals the employee's goals, therefore, if the union's goals are compatible with the company goals, dual commitment is feasible for employees. The key work on dual commitment was carried out by Angle & Perry (1986), they discovered that where there was a cooperative and conflict-free climate, dual commitment was feasible, but, where the climate was hostile, employees were forced to choose between union and company or alternatively to choose to commit to neither.

Sisson (1999) suggests that the 'HRM' model has few supporters and infers that the raft of employee relations regulations, which together with pressures from the EU; following the UK's signature of the 'social chapter' and its incorporation into the Treaty of Amsterdam; was more likely to change employee relations in the future. Additionally, Sisson (1999) reflects that there are key features distinct to the UK's business system that are hostile to HRM, such as; emphasis on shareholder value as a business driver; institutional share ownership that encourages short-term profitability; relative ease of takeover; and, a premium of financial engineering and management in terms of personnel as well as activities (1999:457). He goes further to say that there are few of the pressures found in other developed economies to encourage investment in human capital (1999:458).

Guest (1995:112) suggested that HRM does not threaten the union role but actually may present one basis for a new union strategy. He suggests that as many companies were apparently failing to generate commitment among their workforce that opportunities for unions still existed, and went further by stating that unions should see HRM as an opportunity rather than a threat (1995:112). Sisson (1999) seems to agree where he states that partnership represents a compromise which has appeal on the wider political front due to concerns around the economic and social costs of restructuring, such as costs in unemployment, social welfare, social exclusion and deprivation and therefore to find a way of businesses sharing the cost of this burden has to be a way forward. Sisson also concludes that the emphasis on partnership of modernisation of work organisation, flexibility and security – make a major contribution to competitiveness and address hopes and fears of employees. Therefore the partnership model combines the best of HRM and the pluralist collective bargaining models (1999:460). However, he does note that implementing new working practices associated with the required flexibility that organisations now require to compete in partnership is likely to be problematic (1999:459).

Commentators (Guest 1995; Guest & Peccei 1998; Sisson 1999) shared the view that UK companies are still relatively open-minded about a union presence and are keen to establish competitive advantage via a well-integrated, flexible, committed workforce. Additionally, as restructuring for organisations increase and common opinion suggests that this is likely to

continue to be a dominant activity in the years ahead, these companies may well welcome a union that shares the task of promoting and monitoring the required high standards. In Knell's (1999) research of partnership at work in fifteen organisational case studies, he reports that in 1999 UK trade unions were broadly supportive of the HRM practices and did not perceive that HRM amounted to an anti-union agenda. This support by unions of HRM and the social partnership translated into the acceptance that they should be taking a more positive stance, rather than reactive, towards new management practices. Knell (1999) goes further by stating that these views underlined that values based commitments and principles of underlying partnership are gaining wider support.

2.4 The Benefits Of Partnership

Employer-union partnership as reflected within the principles of partnership of the IPA, based on the foundations of job security and flexibility, has at its heart a core of mutuality. It is stated that mutuality can bring benefits to both employers and unions (IPA 2004:8). This claim has attracted a raft of research over the preceding years, which has resulted in some conflicting studies that both support and detract from partnership and the pros and cons of being involved in partnership.

Workplace partnerships are built on the recognition of the employee's needs for employment security and the company's need to maximise flexibility; sharing the success with the company; informing and consulting staff at the workplace and at the company level; and representation of the interests of employees. This 'core' of partnership can be seen reflected in the IPA's (2004) shared commitment principles and practices of a partnership approach. These identify certain business benefits that should be produced if 'best practice' is followed, such as a competitive edge for the organisation; change implemented with assistance rather than resistance; higher levels of staff retention; better decision making; and, fulfilling the ethical expectations of staff (IPA 2004:7). They also identify benefits for trade unions and specific benefits for staff representatives, such as; for unions – opportunity to maintain or increase influence on company strategy; opportunity to increase membership levels in unionised partnerships; opportunity to become an equal stakeholder in the organisation: and for employee representatives – opportunity to ensure that the impact on staff is considered in any decision; and, opportunity to develop the skills of the representatives to a much higher level (2004:7). Guest & Peccei (1998:32) within their research, identified three key areas within which outcomes of a partnership approach are likely to be beneficial, namely:

- Employee attitudes and behaviour (in terms of contribution and commitment)
- Employment relations (measured by labour turnover, retention, absence and conflict)
- Organisational performance (the business benefits of partnership being reflected in improvements in productivity, quality, innovation, sales and profits)

For many trade unions in the UK weakened by membership decline and marginalisation, partnership presents an opportunity to develop a relationship with management based on cooperation and this has represented a means to regain a degree of involvement in decision making (Bacon & Blyton 2006). Some studies have suggested that partnership can provide an alternative means for unions to promote a wider range of issues as compared to traditional collective bargaining (Kelly 2004).

In Bryson (2001), trust in management appears to be highest where there is a balance of power between unions and management and lowest where management actively discourages membership, and that managerial support for unions, may indicate employer interest for workers concerns which may lead to more positive attitudes to management. Therefore, it follows that management can influence employee perception via its engagement with unions and foster high trust relationships with employees by ensuring that unions have sufficient power to make a positive contribution to the workplace. Johnstone (undated) indicates that unions may benefit from greater influence, access to more business information, improved job security for members and inter-union cooperation. Acker & Payne (1998) indicate that partnership offers British unions a strategy that help them shape their own destiny as well as move with the times and accommodate new political developments. Haynes & Allen's (2000) study seems to concur with highlighted benefits for both unions and employees, with increased union membership and density, and better communication for employees.

Knell (1999), conducted a comparative case study of 15 organisations within which all of the involved case study firms assert that the adoption of a partnership approach has helped them to achieve enhanced competitive performance. Knell concludes that although it is difficult to establish how much of the performance improvement is due to the adoption of the partnership approach, as opposed to the utilisation of leading-edge work organisations and labour management techniques, it does appear quite clear that the adoption of a partnership approach focuses an organisation towards pursuit of "a broad range of new labour management practices and work organisation transformations, as exemplified by the impressive scope of innovation amongst our case study firms" (1999:30), and that these efforts were operated methodically and effectively to engage in processes of continuous improvement and delivering real improvements to the bottom line performance, and that, partnership, was the 'vital enabler' in this improvement.

There is evidence to suggest that a partnership approach to industrial relations can be pivotal to introduce workplace innovations, increase motivation and employee morale and therefore lead to greater organisational success, and that this presents an opportunity for potential union revival by linking union cooperative involvement to management of organisational

change (Heaton et al 2000). Other studies have reflected that partnership sometimes may be introduced, for example, during mergers and takeovers as a way of stabilising industrial relations for restructuring and thereby facilitate management during the process of change (Oxenbridge and Brown 2004a) and additionally, to legitimise that workplace reform (Martinez Lucio & Stuart 2000). On the whole for the employer, workplace facilitation of workplace change was seen as a clear benefit of cooperation (Oxenbridge & Brown 2002; Oxenbridge & Brown 2004a).

However, there are warnings and critics amid this plethora of beneficial evidence. Kelly (2004), probably the most prominent critic of partnership, has argued that unions have not been more effective through social partnership than under conventional non partnership arrangements of improving job security and wages, and further that trade unions are more likely to suffer rather than do well out of cooperation, being compromised by a position of responsibility without power. Overall, Kelly feels that the environment for partnership in Britain is not especially hospitable. Others report that as a consequence of the power compromise that Kelly (2004) identifies, unions may lose membership support (and members) by their inability to demonstrate their effective opposition to management (Bacon & Blyton 2006:3). Bacon & Blyton (2006:3 & 16) note that if cooperation is merely the most that emasculated trade unions can achieve by way of engagement with management, it might well deliver few positive outcomes, for employees in particular, and that a more conflictual orientation by trade unions could enable them to gain more from cooperating with management in joint problems solving activities, i.e. management would offer more concessions. In short that this conflictual stance provides a better position to assess the minimal acceptance package for managers revealed during a negotiation process (2006:16), and that this in turn would help employees be more favourably disposed to the new work arrangements i.e. this approach appeared to generate better outcomes regarding employee attitudes than cooperative joint working. Johnstone (undated) states that there are concerns that managers may lack commitment due to concerns that partnership may slow down decision making, and unions are worried that they will be perceived as too close to management and become party to unpopular decisions such as job losses. Bacon & Storey (2000) suggest that there is evidence that the underlying attitudes towards joint governance may be little changed, with some companies just espousing partnership, rather than pursuing partnership (2000:425), and the balance of evidence seems to point more to shrewd bargaining than genuine partnership at work (Martinez Lucio & Stuart 2000).

It is clear that there are barriers to partnership. In particular, as organisations are made up of a diverse range of stakeholders, it therefore follows that the establishment of mutual gains and common understanding is unlikely to be a straight forward process (Knell 1999) as each different group, management, employees and unions, have differing interests. Some management appear to exploit the tensions existing between shop stewards, and in particular

that some management encouraged particular forms of union behaviour in order to further its objectives (Heaton et al. 2000; Martinez Lucio & Stuart 2000). A differing treatment of workplace unions conveys a message of unequal status and consequently can heighten inter-union tension, reflecting a management tendency to seek a perceived advantage through a divided union presence (2000:321) however this can contribute to a feeling on insecurity amongst some workgroups. Heaton et al (2000) concluded findings that the quality of the relationship within the organisation appears to be a significant factor in determining the quality of the partnership arrangements.

2.5 Change, and it's Effects on Partnership, Union Attitudes and Employees

Organisational environments are becoming increasingly turbulent (Burke & Cooper 2004) as a result of more rapid change, and more complex problems. Increasing interconnections lead to externally induced forces that are hard to identify and therefore difficult to predict and plan for. The pace and complexity of change has also accelerated (Burke & Cooper 2004) and now organisations routinely are presented with challenges in various fields such as global competition, government regulations and social attitudes and values. In our current times organisations change all the time (Burke 2002), they have to, as organisations themselves do not last as long as they used to (2002:xiii) Much of that change, in the most part, is unplanned and gradual. Planned organisational change, especially on a large scale is unusual (2002:xiii).

There are differing levels of organisational change, as an individual, as a group and as a larger system (which can be as large as the total organisation). An organisation change effort rarely begins all at once with the total system, especially in a large organisation, and general change will begin by involving individuals or a certain group or alternatively can begin with a recognised need to make significant change (2002:104). In large system change there are generally levels or phases and one the first psychologists that helped understanding of organisational change at the larger system level was Lewin, with his three phase model for change, which, interestingly, is explained at the Group level. Lewin (1958) argued that there were three phases of behavioural change, Phase 1 - unfreeze the system, such as creating a sense of urgency about a plan or educating managers to behave differently, Phase 2 – movement, where the organisation changes, this movement will not occur until there is first an unfreezing, and, Phase 3 –refreezing, where the change that has occurred can not be allowed to dissipate or lose force, so it needs to be reinforced with processes and infrastructure.

Individuals' reactions to significant change in organisations has been likened to the grief curve where they go through various stages of emotion as they try to mentally cope with the changes that have occurred and whether the change is resisted or embraced, (Burke 2002:92). All change is nevertheless a loss experience, even if it is a loss of familiar routines. The best reaction from people that can be hoped for, however strong the organisations psychological contract, is slow, reluctant compliance to change (2002:97).

For organisations to change, employees need to change, as successful organisational change happens at the local level (Dirks et al 1996) and if the employees perceive that the existing employment or psychological contract has been breached, as is common in organisational change, particularly in mergers and acquisitions (Turnley & Feldman 1998) then organisational agents need to re-establish the contract in a way that suits the new conditions, post change, and create commitment among employees (Bellou 2007:80). Getting people involved or participating in helping the change work, can go a long way towards resolving resistance and the degree to which people are committed tends to indicate the degree that they have been involved (Burke 2002:96), and their involvement can potentially contribute to a more effective overall change process (2002:97). Another factor can be a degree of assurance that any change effort will have a positive impact on the employee, as individuals promoted change efforts generally where they believe the change to be enhancing to their personal position within the organisation (Chreim 2006:317).

Bacon & Storey's (2000) research demonstrated the partnership could provide benefits for companies undergoing organisational change, by unions legitimising change programmes once developed, but did stress that the extent to which managers and unions are sufficiently committed to new forms of relationship involving close cooperation, would limit the successfulness of this approach. However, in some of the case study organisations that they studied, the companies only invited the agreement of unions after the managers had introduced substantial changes in order that the unions could legitimise them, and that therefore, the signing of partnership agreements could not be taken as an indicator of change in management preferences towards union activity or behaviour. Bryson (2003) suggested that although academic and practitioner literature has largely ignored the role of unions in managing the risks of merger, it would appear that the general compatibility of employment relations approaches is a strength in managing the HRM risk of significant organisational change, and in this case merger, as it appeared that demonstration of union involvement possibly contributed to workforce stability. Knell (1999) agrees that there is no doubt that "we are witnessing a shift in the conduct of economic activity. The basis of competitive advantage is increasingly derived from the value contained within intellectual capital and its application" (1999:31) and that as a consequence of this, partnership should become progressively more important for companies for the way their business is managed and organised well and the dynamics of trust, commitment and innovation become increasingly key in this environment.

Knell, further states that partnership specifically enhances rates of innovation and improve enterprise performance and that it can foster greater social justice and an enriched work experience for employees. He suggests that this powerful pairing could prove "to be a vital component of UK enterprise's adaptation to the demands of the new information age" (1999:31). Others suggest that high trust and high involvement management strategies towards forms such as partnership will play a critical role in the attempt to find sources of legitimacy for workplace change (Martinez Lucio & Stuart 2000) and have found that union involvement softens organisational change and restructuring, by unions acting as an intermediary to gain workforce cooperation (Oxenbridge & Brown 2004a: 194), which smoothed the change process as their involvement helped to prevent damage to employee moral (2004:194).

Knell (1999) specifically directs attention towards the challenges around developing genuine partnerships within organisations where substantial broad change is to occur, such as the flattening of hierarchies; growth of work groups; devolvement of responsibility; and, he suggests that adopting a partnership approach in these circumstances can have far-reaching implications for an organisation, as partnership can be effective at stretching the competencies of workers and managers and challenges existing power structures and perceptions of job security (1999:14). Tailby et al (2004) identified that government led reform agendas can undermine the effective management of change and break down trust between employees and the organisation, as this 'interference', which necessitates the organisation to be largely responsive to government priorities, can compromise an organisation's ability to maintain robust partnership agreements (2004:416-417). Redman & Snape (2006) and Turnley et al (2004) identify that a breach of the psychological contract correlates to union commitment and participation. Reilly (2001) conducted a project to look at partnerships under pressure. He identified that partnership came under pressure from a variety of sources, some of which are related to change, such as changes in corporate ownership and management, such as mergers and acquisitions; and, internal restructuring – downsizing, outsourcing. The report states that by and large a mature partnership arrangement should be able to cope with a normal change programme (2001:15), although this can begin to become challenging if employees feel that their interests are threatened, such as fewer jobs or radically different jobs, and the more threatening the change programme looks to employees makes coping as a partnership more difficult to do, with downsizing to the point of closure and or job cuts can potentially deal a death blow to any partnership arrangement, and certainly fatally damage it (2001:16). The impact of redundancies on an organisation and its people is considerable, both those made redundant and the survivors as it affects the work organisation going forward and the survivor's commitment to their organisation (Worrall et al 2000). Knell (1999) agrees with these findings in the conclusions of his comparative case study he states "In a very real sense the most enduring test of partnership relationships is how effectively those relationships can survive a wave of redundancies, and how far attitudes and practices forged

through developing partnership extend to management and conduct of such decisions" (1999:15).

2.6 Different Levels of Partnership

With the many pressures that partnerships face, which as well as change includes, loss of key personalities; misunderstandings about partnership and disagreements over rules of the game; lack of trust; loss of support; imbalance in skills and knowledge; and rows over normal business (Reilly 2001:x), it is no wonder that the durability and the stability of partnership has been called into question (Haynes & Allen 2000; Reilly 2001; Oxenbridge & Brown 2004a; Kelly 2004), so what makes a partnership strong and weak and how can partnership best be protected to endure?

Oxenbridge and Brown (2004a&b) have extensively studied partnership, its types of relationships, and the robustness of those partnerships as a measure of durability. They (Oxenbridge and Brown 2004b) define robust and shallow relationships as follows: Robust partnerships confer a range of benefits – although not necessarily equal benefits- to both parties, union density ranges from 40 to 90 per cent, with traditionally high membership levels and unions are negotiated with on pay, terms and conditions. Stewards have a strong legitimate position in the organisation and have extensive input into decision making. The union feels that high degree of influence at the earlier stages of decision making, particularly over workplace level decisions and employers support of trade union recruitment of new members. Shallow partnerships, on the other hand, confer fewer benefits to one party: the union, and are essentially shallow rooted in their formation, substance and potential long levity; and they demonstrate an absence of the union benefits defined within the robust definition (2004b: 192). Oxenbridge and Brown (2004a) studied the durability of partnership by means of case studies, and concluded that although most of the partnerships they studied were not particularly 'old' (as indeed partnership is a relatively new concept) and therefore had not necessarily 'stood the test of time' they had found evidence that suggested that the partnerships that proved 'robust' were those within which the "employers perceived an advantage in a clear and independent employee voice" (2004a: 401). They noted that this was generally more likely to be found in organisations where union membership was high, although they expected the enhanced consultation and information rights to help to change this. 'Shallow' partnerships were generally present in organisations where union membership was low and either the workforce were apathetic about union membership or the employers curbed the union recruitment within the organisation.

Others have commented on how best to protect partnership from the turbulence and the pressures of organisational evolution, and there are some differing views. Haynes & Allen

(2000) in their study of partnership as a union strategy identified three elements that were necessary for enduring union-management partnership – mutual legitimisation of sometimes differing interests, so that each party recognises the legitimacy of the other party in order to limit opportunities to block participation and benefit; parties' expectations about roles and behaviour must be clearly defined in order to establish the high levels of trust required; and, union leaders and members, along with managers, must experience cooperative practices as mutually beneficial, and that this last element implied an expanded role for unions of involvement in strategic management (2000:181). Reilly (2001:42-50) thinks institutionalising partnership arrangements seem to be the key method to develop a robust employee relations strategy that will survive the turbulence of organisational life. He went further by suggesting that this could be achieved by embedding partnership within the organisational culture by reflecting partnership in all its structures and processes and systems and reinforcing the consultative and communication arrangements and training all managers and staff representatives.

Reilly (2001:68-70) lays out some prerequisites for success - top-level commitment; risk taking by both managers and representative groups; acceptance of multi-channel representation; dealing with recalcitrance; moving away from confrontation; acceptance of the validity of each others goals; marketing the benefits of the chosen approach to the employee; recording the partnership; integrating partnership with other people's practices; recognising the individual; and, investment of time and energy.

2.7 Summary and Conclusions

The aim of this paper is to report findings of a explanatory causal case study of two employer –union partnerships over a seven year period, whilst they endure organisational change and to study the effects this change has on the stability of the partnership; the first characterised by the IPA as strong and successful; and, the second characterised as weak and struggling. Whilst most attention in academic research has been focused on the success and benefits of partnership in delivering higher performance and better employee relations climates, as well as the reality of real 'mutuality' in partnership, there has also been recognition surrounding the importance of partnership in managing organisational change (Bacon & Storey 2000; Bryson 2003; Knell 1999; Martinez Lucio & Stuart 2000; Oxenbridge & Brown 2004a), and the importance of stability in partnership (Reilly 2001; Oxenbridge & Brown 2004b), and further research identifies pressures on partnership whilst undergoing organisational change (Tailby et al 2004; Oxenbridge & Brown 2004b; Redman & Snape 2006; Turnley et al 2004; Worrall et al 2000; Knell 1999; Reilly 2001). However, detailed explanatory studies that draw together the differing strands of pressures on partnerships, whilst enduring organisational change, remain few; and this study aims to contribute further evidence on the differing pressures on partnerships enduring change. To pursue these aims, it has been necessary to develop a

theoretical model of how organisational change effects partnerships. From the literature review a number of variables were identified which affected deterioration of the employer-union partnership undergoing organisational change, these have been incorporated into a theoretical model (see figure 2.1 for Model A), which maps the relationships between the multiple variables. To develop the theoretical model further, into one that would demonstrate clearly how the variables contribute to the problem of deterioration of partnership under organisational change, it was necessary to develop specific models against the two levels of partnership, weak (see figure 2.2 for Model B), and strong (see figure 2.3 for Model C).

The variables identified within this study are:

- **Dependent variable** – the variable which forms the focus of this research (Jankowicz 2005:238) - **Deterioration of management and union attitudes as they experience organisational change** - It would be expected to find a difference in the dependent variable, as attitudes react and change over time in the pace of change.
- **Independent variable** – the variable regarded as possibly the cause of the observed effect (Jankowicz 2005:238) – **incidence, type and degree of organisational change** – it would be expected to find a positive effect on deteriorating attitudes (i.e. one of increasing the chance of deterioration) as the pace or degree of organisational change increases.
- **Moderating variable** - the variable that is thought to affect the strength of the relationship between the independent and dependent variables (Sekaran 2000:95) – **the strength of the partnership using the typology of Oxenbridge and Brown (2004b)** – it is expected to find a weaker relationship between the dependent and independent variable the stronger a partnership is defined to be i.e. the stronger the partnership the less deterioration of attitudes would be expected in an environment of significant change.
- **Intervening variable** – the variable that is thought to help conceptualise and explain the influence of the independent variable on the dependent variable (Sekaran 2000:99) - Managements '**cynical**' **approach to the creation of partnership** – it would be expected to find a positive effect on the independent variable (i.e. deteriorating attitudes) if the partnership was created 'cynically' or with 'cynical' objectives.

Figure 2.1 – Model A - Diagram of the variable relationships effecting partnership deterioration under organisational change

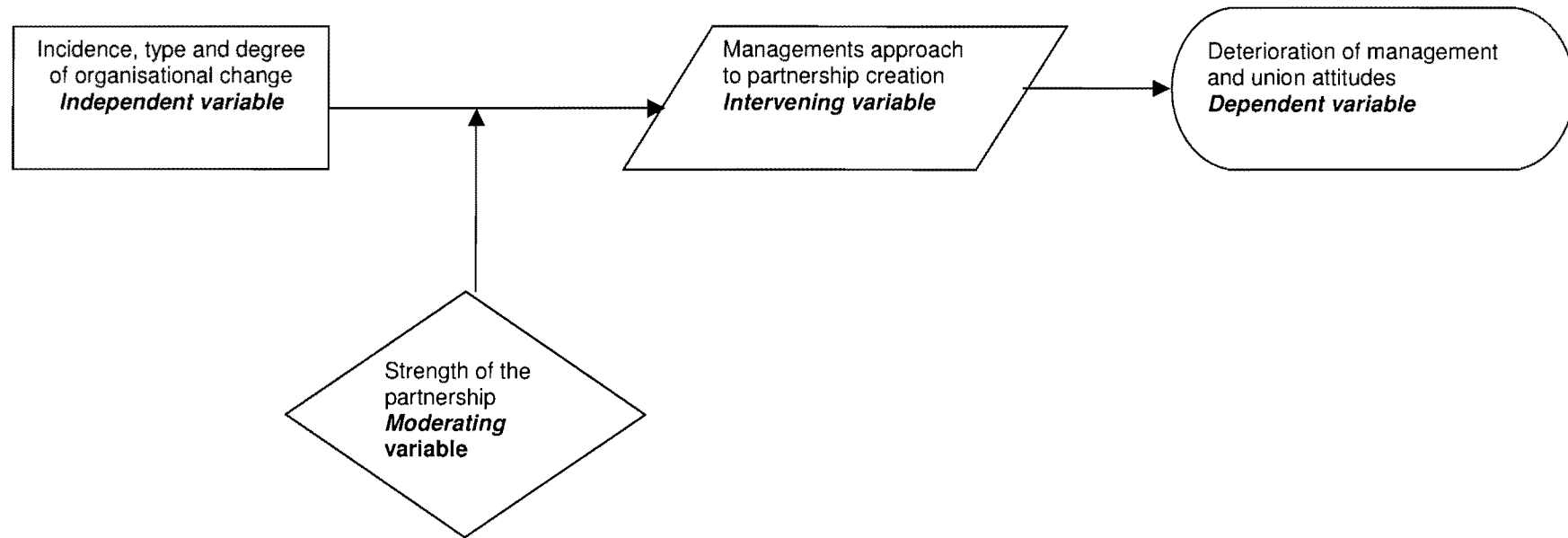


Figure 2.2 – Model B - Deteriorating factors for a weak partnership experiencing organisational change

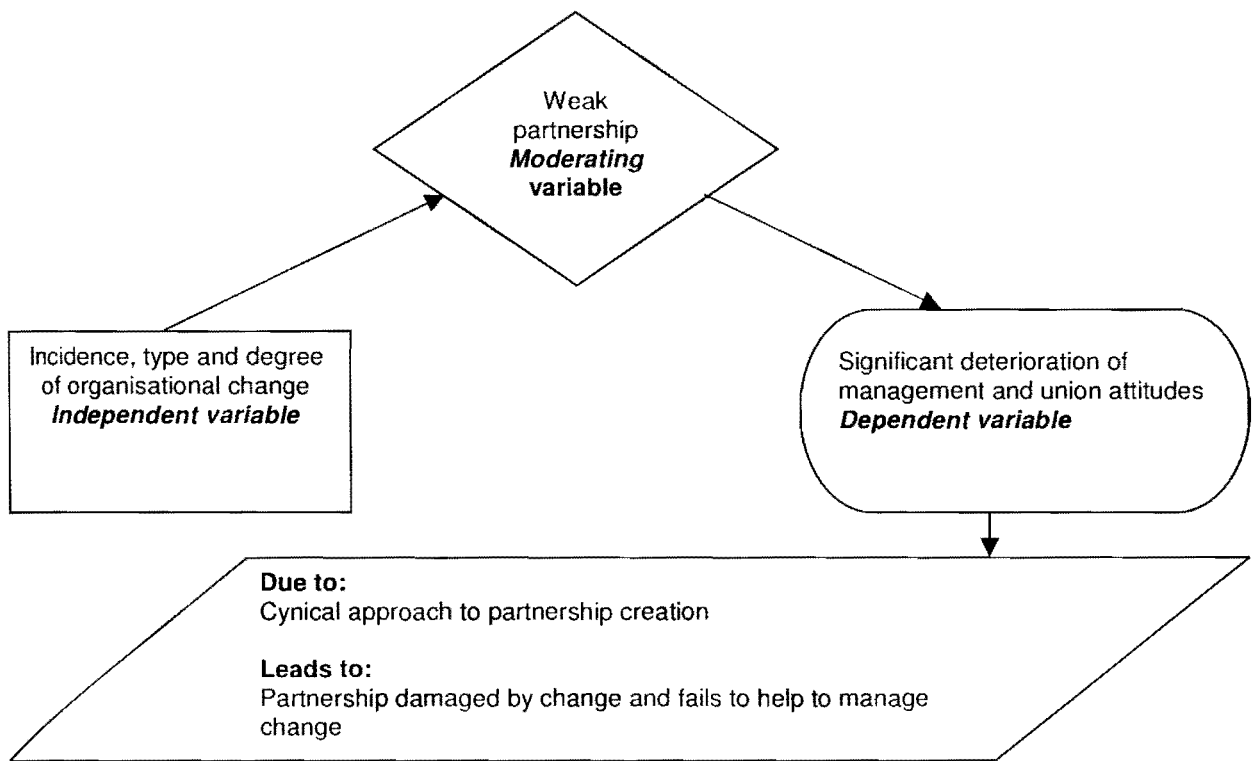
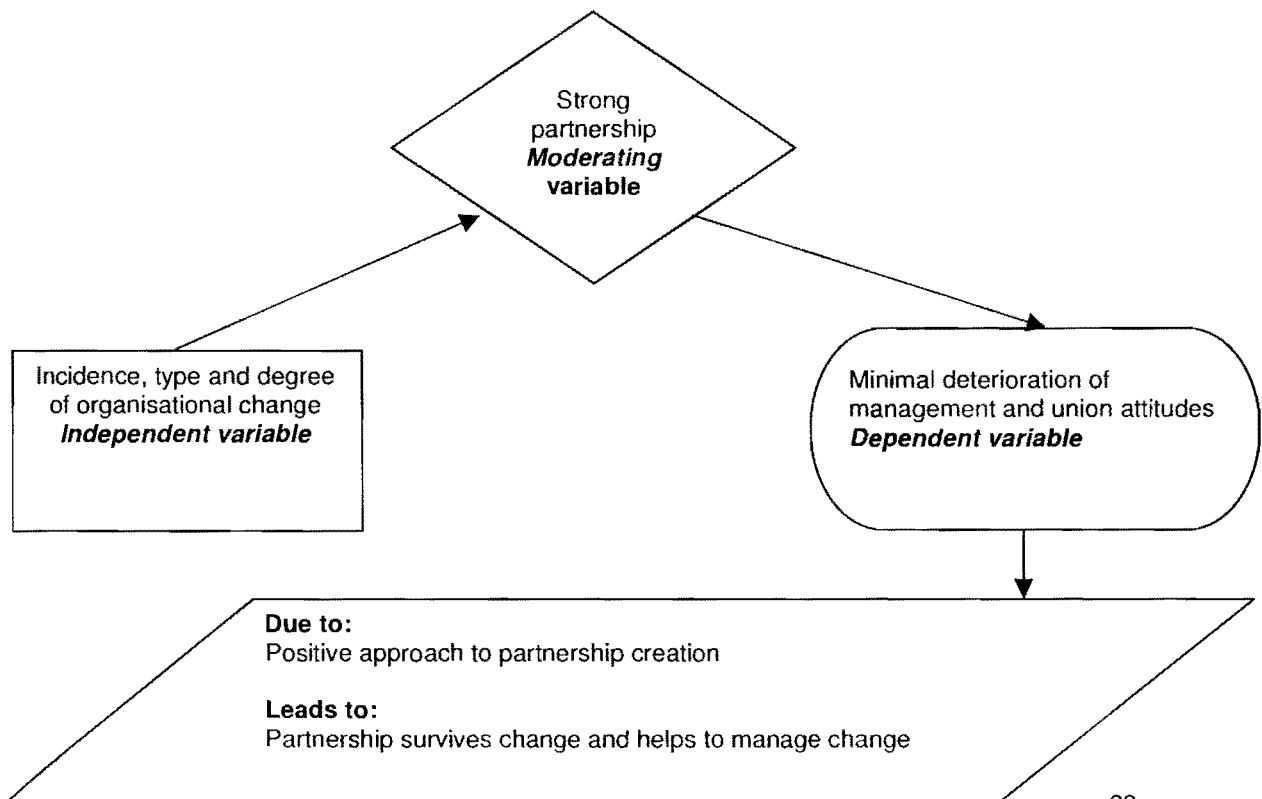


Figure 2.3 – Model C - Deteriorating factors for a strong partnership experiencing organisational change



3. METHODOLOGY

3.1 Study Design

The aims of this research had identified a number of objectives and hypotheses, which are listed below:

Objectives

1. A comparison of the organisation's partnerships as they experience the pressures of organisational change over time
2. A comparison of each organisation's management approach to the creation of partnership and the circumstances surrounding its creation
3. A comparison of the management and union attitudes prior to and following organisational change
4. A comparison of the effects of the partnership on improvement of the management of organisational change

Hypotheses

1. Employer-union partnerships will inevitably deteriorate under the pressure of organisational change
2. A major cause of this deterioration will be the misuse of the partnership concept by employers to fast-track organisational change
3. Manager and union attitudes to partnership will deteriorate under the pressure of organisational change, and this deterioration will be a contributing factor to the deterioration of the partnership
4. The stronger an employer-union partnership is, the more robust to organisational change deterioration it will prove

To test the hypotheses, an explanatory study was carried out in order to investigate whether partnerships necessarily deteriorate whilst enduring organisational change in the public and private sector. The study took the form of a causal comparative case study using both archive professional and academic literature within the public domain and key informant semi-structured questionnaires. The method of explanatory study was chosen, as it is a methodology more suited for the design and implementation of causal studies (Yin 2003b: 20), particularly for complex or multivariate approaches, such as in this case. It also allows the study to take advantage of pattern-matching analysis techniques, where patterns can be related to both the dependent or independent variables (Yin 2003a: 116). A causal design was chosen as it allows this research to look for reasons of the events and situations being studied, rather than concentrating on the simple exploration and description (Jankowicz

2005:199). The choice of also incorporating into the design the aspect of a comparative case study was pursued in order that several organisations could be selected in order to allow the prediction of contrasting results, for predictable reasons i.e. theoretical replication (Yin 2003a: 47).

In conclusion, it was identified that an explanatory causal comparative case study utilising published works and articles, to study the partnership over time; and a structured key informant questionnaire to bring the data collected up to date, and put the partnership into context, with questions aligned to the variables, hypothesis and objectives of this study, would be practical in regard to time and resources, and would achieve a richness of data that could be rigorously analysed via the pattern matching techniques, would be more likely to achieve the objectives of this study. In effect to clearly demonstrate the effects organisational change cause to those who constitute a partnership, and whether the partnership deteriorates due to this cause. It was also felt that the IPA could be helpful to such an approach, with assistance in selecting case study organisations, which operated in differing sectors and were illustrative of the different dimensions of partnership i.e. a selection from the strong to the weak, and who would be likely to be open to participation.

An explanatory study then is not about identifying changes in the partnership as they happen, but rather it is studying data expressed in published articles and works (secondary data), and via the key informant questionnaires (primary data), to see how the partnership changes over time and the variables that cause those changes i.e. answering the questions of 'how' and 'why' (Yin 2003a: 6) of an explanatory case study; and utilising the data captured by a questionnaire, aligned to the variables and hypothesis of this study, to bring that information up to current times. The questionnaire also provides information, with which to judge the 'robustness' of the partnership, against the typology criteria defined by Oxenbridge and Brown (2004b).

The IPA were contacted to request support in reducing the pool of existing partnerships, and to inform the process of selection to ensure that case study organisations were selected that would meet the criteria of this study. The IPA were generous with their time and allowing access to their records, which allowed selection of three organisations, to meet the needs of this comparative case study. The needs of this study were to meet the objectives of this research i.e. ranged across the public and private sectors; had in place a employer-union partnership that had been in place since circa year 2000; had experienced significant organisational change including redundancies; and, illustrated the differing dimensions of weak and strong partnership. Unfortunately during the progress of this study, only two of the three organisations actually participated in this study, the third organisation, contacted several times through June and July 2007, and although initially agreeing to participate, failed to complete their key informant questionnaires in actuality.

To ensure the ability to generalise the findings of this study, replication has been ensured by choosing two case studies of differing partnerships – one from the public sector and one ex-public sector organisation, which has been privatised in recent times. Additional replication has been added with the choice of partnerships that reflect the spectrum of success within these relationships – one is classed by the IPA as a strong partnership and one is classed by the IPA as a weak partnership and continues to struggle in recent times. This option has been pursued in order to predict contrasting results for predictable reasons, and this replication is in essence a theoretical replication within the study (Yin 2003a: 47).

A semi-structured questionnaire was used as opposed to a structured questionnaire as a means of primary data collection, as it offers more freedom to collect the history and detail of a situation that has occurred than a fully structured questionnaire, and was thought to give more opportunity to collect the desired richness of data, that it was thought could lead to an informative and interesting analysis (Jankowicz 2005:257). It was recognised that a semi-structured technique may also allow the information to be presented in a disorganised way that could make analysis difficult, so the questionnaire was designed to classify and categorise the data in a way that would promote content analysis via pattern matching. Key informants were chosen due their key role with the employer-union partnership of each subject organisation, participation was requested of a minimum of two key informants from the management and the union representative side of the partnership across all participating organisations, whom had been involved with the partnership for a minimum of two years.

Key informant interviews across all comparative organisations studied over a period of time, were considered but rejected due to time intensiveness, the geographical dispersal of the organisations chosen, and practicalities. Also considered, but rejected, was the concept of selecting a wide selection of organisations across the public and private sectors, and the circulation of key informant questionnaires, such as those used for this study. This latter concept was rejected due to the multivariate nature of the study, and the restricted pool of suitable organisations from which to select from, taking into account the limited number of partnerships across industry sectors and due to the required selection criteria of: having experienced significant organisational change; having a IPA recognised partnership arrangement; having a range of partnerships that were likely to be at the different points in the 'robust', 'shallow' dimensions of partnership strength; and, being employer-union partnerships, rather than employer-employee partnerships. It was also considered that a study of this scale would require a less detailed questionnaire for the key informants, due to concerns surrounding a manageable level of data returned, and therefore would be less likely to achieve the quality of data that this study requires.

3.2 Selection of Academic and Professional Literature

In order to collate the necessary secondary data, with which to inform the key areas of enquiry of this research, including the history of the creation of the employer-union partnership; the history of the partnership in the years pertinent to this study of 2000 to 2007; and, the degree of organisational change in both chosen subject organisations; it was necessary to conduct a highly specific and selective search of all public domain academic and professional literature. This was carried out with a focus on articles or studies that looked closely at aspects of the employer-union partnerships in the two subject organisations; the Royal Mail; and the Nottinghamshire Healthcare NHS Trust; utilising academic search engines, such as EBSCO host via the university and CIPD portals; and the British Library search facility. Articles and studies were also sourced via the IPA and the subject organisations themselves that were not widely found in the public domain such as the Sawyer report and the Department of Health reports on the Trust.

3.3 The Questionnaire Design

The questionnaire presented in Appendix 1 was designed to collect the primary data necessary to establish; the key informants role with the partnership; managements approach to, and the circumstances of, the creation of partnership; the degree and type of organisational change experienced by the organisation in recent times; what effects this change had on management and union attitudes towards the partnership; the pressure points on the partnership; the difference the partnership approach made to the management of organisational change; and whether the partnership had delivered benefits or been of value. Questions 4 to 6 were designed to present the necessary data to allow a definition of the robustness of the employer-union partnership in the two chosen subject organisations.

The criteria chosen with which to analyse the robustness of the partnership are within those determined by Oxenbridge and Brown (2004b) which they argued can define a partnership as 'robust' or 'shallow' i.e. density of union membership, and whether it has been maintained for a considerable period of time; degree of responsibilities and rights of the union recognition agreement; whether the unions had a strong, legitimate position in the organisation; extensive input into organisational decision making; and whether the employer actively supports trade union recruitment (Oxenbridge & Brown 2004b:390).

The other data that the questionnaire was designed to collect, was defined as being required to meet the objectives of this study and was formulated with regard to the objectives, hypothesis and variables (see above) of the research i.e. the key informants role with the partnership; managements approach to, and the circumstances of, the creation of

partnership; the degree and type of organisational change experienced by the organisation in recent times; what effects this change had on management and union attitudes towards the partnership; what were the pressure points on the partnership; the difference the partnership approach made to the management of organisational change; and whether the partnership had delivered benefits or been of value; and these aspects are reflected in questions 1-3 and 7 to 14.

These particular fields of enquiry have been specifically designed to capture the most significant circumstances that pressurise partnerships as indicated from the literature review.

3.4 The Organisations Studied

Three subject organisations, The Royal Mail, Legal & General and The NHS Nottingham Healthcare Trust, were contacted in June 2007 for assistance in this study. As has been previously mentioned, they had been selected as subject organisations with the assistance of the IPA due to the following factors – existence of public domain academic and professional literature on their employer-union partnerships; recent experience of significant organisational change; spanning across both the public and private sectors; and, reflected, in the IPA's opinion, the spectrum of robust to shallow partnership relationships. Due to reasons outside of the authors control the Legal & General chose not to participate in this study, despite initially indicating their acceptance.

The Royal Mail Group is a government owned public liability company. The Group is divided into three main businesses: Parcelforce, the Post Office and Royal Mail. The Group employs over 200,000 people, more than 160,000 of them working at 84 main regional offices and 1,500 delivery centres. The Royal Mail collects, sorts and delivers UK mail, and as a provider of a key public service the organisation is regulated by PostComm (the Postal Services Commission) under the Postal Services Act 2000 (Wustemann 2004:15). The Royal Mail Group recognise the unions CWU (Communication Workers Union) and CMA (Communication Managers Association , part of Amicus – now known as UNITE). The IPA regarded the partnership arrangement in Royal Mail to be 'weak' and 'struggling' and as having experienced significant organisational change. The IPA recommended approaching a key contact, Tracey Hammond, who was deeply involved in the creation of the Royal Mail partnership in 2001. Tracey was contacted in June 2007 for assistance in this study, she accepted and arranged the completion of questionnaires from experienced partnership leads on both sides of the partnership; management and union; and across the differing unions; both CWU and CMA.

Nottinghamshire Healthcare NHS Trust is a mental health and learning disability service provider. The Trust was formed in 2001, from a merger of six predecessor organisations, and

provides services for more than 100 sites across three counties (Nottinghamshire, Yorkshire and Leicestershire). The Trust employs over 5,000 staff and formally recognises the Prison Officers Association, Amicus (now known as UNITE), GMB, TGWU, UCATT, and UNISON. Services are provided widely across mental health and learning disability specialisms and are provided in a variety of settings, from the community to high security hospitals (IPA 2004b: 1). The IPA regarded the partnership arrangement in the Trust to be 'strong' and 'successful' and as having experienced significant organisational change. The IPA recommended approaching a key contact, Norman Wilson, who was lead on partnership at the Trust and had been so since its creation in 2001. Norman was contacted in June 2007 for assistance in this study, he accepted and arranged the completion of questionnaires from experienced partnership leads on both sides of the partnership; management and unions; and across a selection of the differing unions; in this case UNISON and Amicus (UNITE).

Non-probabilistic sampling was used to select representatives in each organisation to request to complete the questionnaire i.e. to act as key informants as opposed to probability sampling. This was due to the fact that it was important that the sample represents the groups that understand and form the partnership relationship i.e. active union representatives and managers responsible for industrial relations. Jankowicz (2005:202) would suggest that this was a suitable sampling method when a criterion for a requirement of knowledge and understanding for key informants prevails. The non-probabilistic sampling took the form of purposive stratified sampling of key informants via a self-report questionnaire to ensure that both sides of the relationship, in both subject organisations, was demonstrated and studied. Purposive, to ensure that the key informants chosen had views that were relevant to the issue to be studied; and, stratified, to ensure that both sides of the employer-union relationship were represented (Jankowicz 2005:202-208).

3.5 Data Collection

Academic and professional literature was collated for analysis by a wide literature search, which identified all relevant literature that studied the partnerships in the two subject organisations. Additional partnership literature and recent Annual Reports hosted on the organisations own websites were collated. Where literature had been identified on the partnership, but was no longer easily available by traditional academic search means available to this study, the subject organisations or the IPA were contacted in order to procure the relevant documents. The purpose of the collation of academic and professional literature was to source secondary data that had a specific relation or comment on the partnership arrangements within the subject organisations participating in this study, and relate to the partnership in terms of the years pertinent to this study; 2000 to 2007, and the progress of change within those organisations.

The questionnaire was designed in order to source the primary data from identified key informants within the subject organisations, who had been identified via non-probabilistic purposive stratified sampling. It was requested that each organisation participated with the study, by the response of a minimum of two key union representatives and two industrial relations responsible managers – the key informants. It requested that the key informants completed the questionnaires as fully as possible, as it is these individuals and their attitudes that form the partnership, and experience the partnership and its pressures over time and through organisational change. Where possible it was requested that these key informants had been involved in the partnership for a minimum of two years, to ensure that they had experienced the partnership over time. The questionnaires were completed between July and August 2007.

Although both organisations did their utmost to accommodate the research, it proved difficult to obtain the number of key informants required on the management side from the Trust, despite frequent contact from both Norman and the researcher. However the richness of data provided via the questionnaires from all the key informants who participated has been excellent, and provided a full and thorough source of primary data to analyse. All key informants provided their contact information for follow up enquiries, and where necessary when data was in question, they were contacted to provide clarity. A schedule of the key informants across both organisations follows below, and gives detail of their partnership role and the body that they represent when they act out that role (see figure 3.4 below).

Figure 3.1 – Key Informant Questionnaire Schedule

Partnership Role	Organisation	Representing Party
GPTW Programme Leader – formally Head of Employment Relations	Royal Mail	Management
Industrial Relations Royal Mail Letters	Royal Mail	Management
Assistant National Secretary	Royal Mail	UNITE the union – CMA sector
Chair DRAW National Steering Group	Royal Mail	UNITE - CMA
Divisional Representative	Royal Mail	CWU
Territorial Counter Representative	Royal Mail	CWU
Senior Manager Representative on the National Sector Committee	Royal Mail	UNITE - CMA

Head of Employment Partnerships	NHS Trust	UNISON
Staff Side Chair – local services	NHS Trust	UNITE – Amicus
Staff Side Diversity Lead	NHS Trust	UNITE – Amicus
Head of HR, Employment Relations & Diversity	NHS Trust	Management

3.5 Data Analysis Techniques Used

To enable definition of the organisation's partnership as 'robust' or 'shallow' against the criteria determined by Oxenbridge and Brown (2004b), as previously explained, data was restricted to that provided by questions 4 to 6 on the questionnaire which were utilised to define each organisation's partnership as 'robust' or 'shallow'. Where opinion varied in response to these questions between unions and management, the union perspective was given greater weight, as it was deemed to be an indicator of union cynicism and mistrust, both indicators of a 'shallow' partnership (2004b: 401).

Published works and articles and the questionnaires were utilised as sources of secondary (published works and articles) and primary (key informant questionnaires) data, and extracts or reports of key information were utilised from both data sources, to examine the partnerships chosen. Secondary data has been additionally utilised for this study in order to illuminate this study further than the collation of primary data would do alone, and also to supply a degree of objectivity to the primary data, which could be considered subjective. Primary data has been utilised in order to bring the secondary data up to date and to put this information into context. It also allows for all sides of a union-employer partnership to be portrayed, and therefore reflective of the parties involved in a partnership. Both primary and secondary data have equal validity.

In order for the data analysis of this study to lead to conclusions, academics stress that there is a need for an analytical strategy (Yin 2003a). The analytical strategy that is to be pursued as part of this study takes the form of pattern matching, where the logic of pattern matching compares an empirical pattern with a predicted one, and enhances internal validity when the patterns coincide. Where a case study takes an explanatory form, such as this study, the patterns can be related to dependent or independent variables (Yin 2003a). Yin is not the only supporter of pattern matching as an appropriate analytical technique for a study of this type, Cambell (1975:178-185) also supports the use of pattern matching as a useful technique for linking data to propositions, and Trochim (1989:355) considered pattern matching as one of the most desirable strategies for analysis.

For this study the predicted pattern is indicated by the variables that were identified from the literature review, identified as key to partnership within organisational change, or to the deterioration, or not, of partnership whilst enduring organisational change i.e.:

- Dependent variable - Deterioration of management and union attitudes as they experience organisational change
- Independent variables – incidence, type and degree of organisational change
- Moderating variable - the strength of the partnership using the model of Oxenbridge and Brown (2004b)
- Intervening variable - Managements 'cynical' approach to the creation of partnership

It was also of interest to this study to capture information that would provide data that could establish whether the partnership had improved the management and/or acceptance of organisational change; and, whether significant organisational change affected the partnership detrimentally.

The variables, hypothesis and objectives of this study were utilised to construct five data categories:

- Managements approach to the creation of partnership – aligned to the intervening variable, hypothesis 2 and objective 2.
- Management and union attitude deterioration towards partnership – aligned to the dependent variable, hypothesis 3 and objective 3.
- Partnership improves the management and acceptance of organisational change – aligned to objective 4.
- Significant organisational change affects partnership detrimentally – aligned to hypothesis 1 and objective 3 and the independent variable.
- The stronger a partnership is, the more robust to organisational change it will prove – aligned to the moderating variable and hypothesis 4.

Both primary and secondary data are presented in the form of pattern-matching tables, one for each organisation (see tables 4.1 and 4.2), where the data is presented as a form of evidence of the state of partnership and the history of organisational change within the subject organisations. The data has been organised by placing evidence into one of the five data categories acting as a matrix, listed above. It is expected that this further level of pattern matching will increase the facilitation of analysis (Miles & Huberman 1984). The secondary and primary data are collected in subheading to the data categories, in order to ensure that the nature of the data is clear, but ensure an integrated approach for the analysis. Two techniques were used to represent the pertinent points relating to each matrix category for both the primary and secondary data; extracts from the articles themselves; or a summarised statement of the key contents are related by this study's author. The origin of the voice in

each case is made clear with others voices being represented in italics and in quotation marks, and where the authors voice is represented, utilisation of the standard font used throughout this study i.e. Arial 10. The data is allocated into either the positive match column or the negative match column, dependent on whether the data is indicative of aligning to the intention of the data category i.e. positive match, or not matching the intention of the data category i.e. negative match.

For the primary data there was a further level of correlation, with particular questions being linked to certain of the matrix of categories, to ensure consistency of reporting and pattern matching. The correlation that was utilised is as follows:

- Managements 'cynical approach to the creation of partnership using partnership with unions as a necessary tool to overcome substantial restructuring, headcount reduction, severe industrial conflict and help to deliver change – **correlated with question 7 of the key informant questionnaire**
- Management and Union attitudes deteriorate towards partnership following organisational change, exhibited by cynicism, distrust and anger – **correlated with questions 9 and 10 of the key informant questionnaire**
- Partnership improves the management and acceptance of organisational change – **correlated with questions 12 and 13 of the key informant questionnaire**
- Significant organisational change will affect the partnership detrimentally – **correlated with questions 8 and 11 of the key informant questionnaire**
- The stronger an employer-union partnership is, the more robust to organisational change it will prove – **correlated with questions 4 to 6 in Section A of the questionnaire, which provided the information to form an opinion of the 'robustness' or 'shallowness' of the partnership in the terms of Oxenbridge and Brown's (2004b) model and against the working hypothesis that a partnership that is defined 'robust' would indicate a 'strong' partnership; and with question 14 of Section B of the key informant questionnaire**

The pattern matching tables are followed by a comparative pattern matching table, which attempts to establish an overall summary outcome against each of the matrix of data categories. It is intended that this summary comparative table will help to inform whether the hypothesis of this study stand or fall.

4. DATA ANALYSIS AND RESULTS

4.1 Introduction

In this chapter all the data collected in pursuit of this study will be presented. The data takes the form of both secondary and primary data. The secondary data is drawn from archive professional and academic literature which is within the public domain, where there is a specific relation or comment on the partnership arrangements within the subject organisations whom are participating with this study, and relate to the partnerships in terms of the years pertinent to this study of the year 2000 to 2007, and the progress of organisational change within those organisations. The primary data is taken from key informant questionnaires which were distributed and collected within the subject organisations by a key contact, provided by the IPA, with the request that a response from a minimum of two representatives from both the management and union side, who had been involved with the partnership closely for a minimum of two years, and who would be appropriate for the purposes of this study. The key contact for the Royal Mail was Tracey Hammond, currently a programme leader within Royal Mail, but in 2001 was the Royal Mail's Head of Employee Relations. The key contact within the NHS Nottinghamshire Healthcare NHS Trust was Norman Wilson, Head of Employment Partnerships within the organisation and forms part of their Board of Directors.

The primary and secondary data has been analysed in accordance to the strategy detailed in the previous chapter and the pattern matching tables for the Trust and the Royal Mail follow.

4.2 Pattern matching analysis and Discussion for the Nottinghamshire Healthcare NHS Trust

Table 4.1 - Pattern Matching – Nottinghamshire healthcare NHS Trust

<i>Positive Match</i>	<i>Negative Match</i>
<i>Managements 'cynical' approach to the creation of partnership using partnership with unions as a necessary tool to overcome substantial restructuring, headcount reduction, severe industrial conflict and help to deliver change</i>	
<i>Secondary data – published studies and articles</i>	
The 'Framework for Partnership' agreement came about as a result of a situation ...predating the merger, in which new shift patterns were imposed upon the workforce which had resulted in deteriorating relations and rising staff absence. (IPA 2004b: 2)	The Chief Executive, Jeremy Taylor, saw the creation of the Trust from six predecessor organisations was seen as an opportunity to make a fresh start (IPA 2004b)
	<i>"'Together we can' was important in setting the standards of employee voice desired by the new organisation" (IPA 2004b: 2)</i>
	Trade unions were quite taken aback when the Chief Executive and the Chairman recommended the appointment of a staff side representative onto the Board of Directors (IPA 2004b)
	<i>The Chief Executive stated " nothing in the NHS is achieved with out people agreeing to work together towards a common goal, so why should employee relations be managed any differently" (IPA 2004b: 2)</i>
	The Trust pursued partnership with the unions to improve staff engagement and to manage change across public and private sector boundaries (Nottinghamshire Healthcare NHS Trust 2003).
	Preparatory meetings between the main trade unions were organised a year before the Trust was officially inaugurated, agreeing a new Staff Side constitution for representing the workforce face to face with the

	Trust's management. (IPA 2004b)
	DH Workforce Directorate (2006:44) report demonstrates that the Trust's implemented an improved partnership approach as a partnership agenda was desirable as it represented a best practice approach to staff and management working together to deliver the Trust's vision.
Primary data – questionnaire – Q7	
	The partnership was formed shortly after the formation of the new Trust in April 2001. This resulted in the publication of a 'Framework for Partnership' which sets out the approach for partnership working. (Appendix 2 – Union Questionnaire A – Q 7)
	The partnership agreements outlines a clear set of values to promote a culture of involvement, framework for change in behaviour, formal business process, and sets down the recognition agreements for formal consultation."(Appendix 2 – Union Questionnaire A – Q7)
	Union Questionnaire C reports that the merger that formed the Trust brought together several organisations, creating one mental health and learning disabilities trust. This also brought together different unions and a partnership agreement was created and formally adopted for negotiation and facilities arrangements. (Appendix 2 – Q7)
	Management Questionnaire A reports that the Trust formed in April 2001, and this merger was the backdrop that informed the creation of the Trust's partnership agreement. It became a partnership that was forward thinking, and was based on a strong partnership infrastructure. This secured effective partnership working, involvement and staff engagement, and decision making. (Appendix 2 – Q7).
Management and Union attitudes deteriorate towards partnership following organisational change, exhibited by cynicism, distrust and anger	
Secondary data – published studies and articles	
"As a result of a situation at Rampton Hospital ... where new shift patterns	"A key agenda for partnership working has been the development of a

<i>were imposed upon the workforce. Since then, relations between the management and unions had deteriorated and staff absence had become a serious problem". (IPA 2004b: 2)</i>	<i>project to implement electronic team-based self-rostering for 800 staff.. supported by a new IT system. The focus for this particular project was to improve the quality of care to service users and improvement in the work/life balance of staff through the introduction of flexible working arrangements based on the concept of 'hours of work' rather than fixed shift patterns". (IPA 2004b: 6)</i>
	<i>"It is hoped the project will enable staff to achieve a better work/life balance, which was itself identified as a key issue in an earlier staff survey, while ensuring that the needs of the patient are addressed. Based on the feedback so far, the Trust hopes that following a successful implementation of this pilot, the system can be rolled-out to other parts of the Trust". (IPA 2004b: 6)</i>
	<i>" The next big step for the partnership will be implementing the Agenda for Change in 2004. The Agenda for Change, negotiated nationally with the main health service unions during 2002/3, is designed to harmonise the conditions of service for NHS staff and provide a more transparent system of reward for staff working flexible contracts". (IPA 2004b: 7)</i>
	<i>"As a result of the partnership at Nottinghamshire Healthcare NHS Trust, the unions have agreed to second a representative from Amicus to train in job evaluation and work with the Trust for three months in preparation for implementing 'Agenda for Change'." (IPA 2004b: 7)</i>
Primary data – questionnaire – Q 9 & 10	
Union Questionnaire C reports that there were changes in the senior management that led to some initial difficulties and staff anxieties across the Trust (Appendix 2 – Q9)	<i>"Management and unions saw a partnership approach as fundamental and crucial in working these major changes through" (Appendix 2 – Union Questionnaire A – Q9& 10)</i>
	Appendix 2 - Union Questionnaire B – Q9&10 – reports that the Trust's management generally welcomed Union support and input on issues and that Union representatives attitudes were generally positive.
	<i>"The partnership agreement on the union side was a strength that was maintained throughout the changes and was a support mechanism amongst the different unions represented" (Appendix 2 – Union Questionnaire C – Q10)</i>

	Management Questionnaire A reports that the managers within the Trust have experienced the value of effective partnership working, especially in organisational change. He reports that it has reduced the need for formal and bureaucratic process and prevented grievances etc. The local representatives are very positive and facilitative to partnership practices, and have been instrumental in creating positive change in the Trust. (Appendix 2 – Q 9&10)
Partnership improves the management and acceptance of organisational change	
Secondary data – published studies and articles	
"Quarterly workforce reports at Nottinghamshire Healthcare NHS Trust, which monitor grievances, disciplinary issues, recruitment, retention and absence, also report a "general improvement" on each of these measures. In particular the partnership has meant that individual grievances and disciplinary issues are dealt with more quickly and informally, involving less time and expense on the part of the Trust" (IPA 2004b: 7)	
"Identifying the link between staff involvement and the continued success of the Trust" identifies that the partnership helps to make the "entire organisation becomes increasingly receptive to change" (IPA 2004b:8)	
The DH Workforce Directorate (2006:44) report states that benefits of the improved partnership have been better employee relations and significant reduction in disciplinaries, grievances, disputes and tribunal cases, and the Trust has moved from a high level of conflict in 2001 to very low numbers of formal cases resulting in significant economic gain.	
Primary data – questionnaire – Q12 & Q13	
Appendix 2 – Union Questionnaire A & B – Q12 reports that partnership has helped the Trust by achieving a greater employee acceptance of change.	

Appendix 2 – Union Questionnaire A – Q12 reports that partnership has helped the Trust to maintain a good union relationship through redundancy	
Appendix 2 – Union Questionnaire A – Q12 states that good joint working, valuing and respecting roles and responsibilities looking for good and fair outcomes in very difficult and challenging times have been achieved.	
Appendix 2 – Union Questionnaire C – Q12 states that partnership has led to a greater employee acceptance of change and maintaining good union relationships through redundancy.	
Appendix 2 – Management Questionnaire A – Q12 states that partnership has led to greater employee acceptance of change.	
Appendix 2 – Union Questionnaire C - Q13 states that real organisational benefits were made through greater staff involvement and engagement in the changes, which resulted in much-reduced grievances and disciplinaries, hence industrial relations. Unions experienced benefits with better and quicker results for staff and more informal opportunities for informal resolutions and a positive input into policy. Employees have reported better terms and conditions of working, more say in the workplace and are better informed of changes.	
Appendix 2 – Management Questionnaire A - Q13 states that organisational benefits have been significant from partnership, including significant reductions in levels of formal employment casework and more effective organisational change/development processes and better decisions as a result of joint contributions. It states that unions have a greater opportunity to influence and shape organisational decisions, which gives them a more effective voice for their members; and that staff have a higher level of input, influence and involvement in decision making and more effective representation by their trade unions.	
Significant organisational change will affect the partnerships detrimentally	
Secondary data – published studies and articles	
	<i>"Staff involvement has added to the greater confidence in developing the modernisation agenda/real meaningful involvement is key to successful change responding to the challenges for the NHS."(Wilson 2007a: 15)</i>

Primary data – questionnaire - Q8 & Q11	
Appendix 2 – Union Questionnaire A – Q11 states that the pressure points were the possible redundancies, the new ways of working, work life balance for staff and possible changes to terms and conditions for staff members. And that there was significant workload for the lead representatives and managers.	Appendix 2 – Union Questionnaire A – Q 8 reports that the Trust has endured significant organisational change including redundancies, mergers and acquisitions, introduction of radically different work practices and outsourcing/TUPE arrangements. Additionally it states that there has been massive change on all employment fronts. However Q13 states that this climate of change has not affected the partnership detrimentally despite it's pressures, as overall the partnership is seen as significant value, demonstrating less grievances and disputes, a better climate of cooperation which has resulted in better service delivery.
Appendix 2 – Union Questionnaire B – Q11 reports that pressure points on the partnership whilst undergoing change were ensuring that correct policy and procedure is followed and appropriate consultation is undertaken.	Appendix 2 – Union Questionnaire B – Q8 reports that the Trust endured significant organisational change including introduction of radically different work practices and TUPE arrangements with regard to the learning disabilities residential beds. However, Q13 states that overall the partnership has been of value to organisation, unions and employees.
Appendix 2 – Union Questionnaire C – Q11 reports that pressure points on the partnership where the overall pace of change, there were differences of opinion regarding necessity and issues of cost savings, there were issues of level of involvement and consultation and surrounding the impacts of change on staff, for example rising sickness levels etc.	Appendix 2 – Union Questionnaire C – Q8 reports that the Trust has endured significant organisational change including redundancies, mergers and acquisitions, introduction of radically different work practices and outsourcing/TUPE arrangements.
Appendix 2 – Management Questionnaire A – Q11 states "There are often very difficult situations where organisational change occurs, where individual staff member or indeed service users/carers are unhappy with a proposed change/development and where anxieties need to be addressed and resolved sensitively. We have normally been able to address such tensions through a partnership approach. It is important to recognise that sometimes the aims of the organisation may run contrary to the desires of individuals and therefore pressure can arise."	Appendix 2 – Management Questionnaire A – Q8 reports that the Trust has endured introduction of radically different work practices and outsourcing/TUPE arrangements. It also reports that the trust has avoided any need for compulsory redundancies to date.

The stronger an employer-union partnership is, the more robust to organisational change it will prove.

Secondary data – published studies and articles

<p>"The Trust and unions began negotiations to develop a formal partnership agreement upon which to build more co-operative relationships between management and staff representatives, and in May 2002 signed the "Framework for Partnership" agreement. The agreement is regularly updated, to take account of new developments in the Trust". (IPA 2004b: 3)</p>	
<p><i>" The 'Together we can' principles form the 'aims and values' of the partnership agreement and as Norman Wilson points out, this is important because they formally align the broad interests of the broad interests of the staff organisations with those of the Trust. He adds that, this should not be perceived as an indication of union weakness, and is clear that all the staff organisations continue to exercise independent views on a wide range of issues". (IPA 2004b: 3)</i></p>	
<p><i>"The agreement also identifies the responsibilities of the Trust and staff organisations in the success of the partnership" (IPA 2004b: 3)</i></p>	
<p><i>"In particular the agreement establishes a formal framework of mechanisms for workplace representation including a Trust Staff Partnership Forum (TSPF) and Local Staff Partnership Forums (LSPF's). These are also intended to facilitate more informal working between the Trust and staff organisations and critically to support direct employee involvement" (IPA 2004b: 3)</i></p>	
<p>"The TSPF is the focal point of the formal partnership framework. Membership of the TSPF includes the Chief Executive, Personnel, Organisational Learning and Communications Director, two other members of the Executive Team, and one accredited representative per 350 members from each recognised staff organisation (as required by the Staff Side constitution)". (IPA 2004b: 4)</p>	

<i>"The partnership has created a number of full-time union posts: a Head of Employment Partnerships and two joint staff side chairs. All three are elected by the membership, but are on full-time secondment to their trade union, paid for by the Trust." (IPA 2004b: 4)</i>	
<i>"Head of Employment Partnerships and full-time officers also have a key role in organising partnership activities and raising the profile of partnership and employee involvement across the Trust". (IPA 2004b: 4)</i>	
<i>"The Partnership workshop programme has taken some four and a half thousand out onto events over the last few years, the success of the events has been significant with staff identifying a high level of support and reporting that the days have meant genuine involvement with the opportunity to influence decision making, the shared learning has been comprehensive" (Wilson 2007a: 14)</i>	
<i>"Major improvements over the last 4 years due to the employment partnership approach (as reported in the quarterly workforce report to Trust board) – significant reductions in grievances, disputes, disciplinaries, employment tribunals. Higher staff morale has been identified by the staff survey." (Wilson 2007a: 14)</i>	
Primary data – questionnaire – Q's 4 –6 & Q14	
This partnership has been demonstrated via Q's 1-6 as being 'robust' against Oxenbridge and Brown's (2004b: 388-402) definitions, with membership density of 71-80% which has been maintained for the past 5 years, and the unions are negotiated with for pay, terms and conditions and have a strong legitimate position in the organisation and extensive input into organisational decision making and active organisational support trade union recruitment. (Appendix 2 – Union Questionnaire A & C and Management Questionnaire A)	
Union Questionnaire A states that the partnership has maintained and strengthened since organisational change via a joint commitment to success. This includes, building trust, recognising the legitimate role of partners, addressing security and flexibility and informing and consulting staff	

(Appendix 2 – Q 14).	
Appendix 2 - Union Questionnaire B – Q14, reports that the partnership has remained very much intact post organisational change.	
<i>"The partnership agenda within the Trust has grown and improved since 2001."</i> (Appendix 2 – Management Questionnaire A – Q14)	
<i>" Organisational change is consistently ongoing"</i> (Appendix 2 – Union Questionnaire C – Q14)	

4.2.1 Did management cynically approach the creation of the partnership?

Both the primary and the secondary data pertinent to the Trust, and the creation of its partnership indicate that the Trust's management took a positive approach to partnership. Additionally it appears that the Chief Executive took steps to ensure that the partnership was embedded within the organisation and had an equal voice to management, by recommending the appointment of a staff side representative onto the Board of Directors, and instigating a report laying out the standards of employee voice desired by the Trust in 'Together we can'. Extracts, from both primary and secondary data evidence that he did this to ensure that employee relations within the Trust took the approach of people working together towards a common goal and demonstrates that the Chief Executive was successful in embedding the partnership within the Trust. The evidence here, both between union and management representatives, and between the primary and secondary data, are wholly consistent. The totality of the evidence suggests a negative pattern match with the first data category, as there appears to be an absence of cynicism in the approach to partnership creation in the Trust, and suggests rather, that it has been approached with a view to improvement of the overall operation of the Trust as a business and a provider of healthcare to it's community.

4.2.2 Did management and union attitudes deteriorate towards partnership?

The secondary data pertinent to the Trust's management and union representatives deterioration of attitudes, or absence of, towards the partnership itself, as the organisation undergoes organisational change, indicates that management and unions worked closely together on change projects. Primary data informs us further that joint working between unions and employers within the trust was seen as crucial to managing change effectively, from both the union and Trust's management perspective, and was seen as a valuable change management mechanism. Overall there appears to be no evidence of a trend of deterioration in attitudes towards partnership from either the management or union side, although there is recognition that in the early days of the partnership, changes in the senior management team did cause some difficulties and staff anxieties. This appears to have been an early problem that has not been repeated. Therefore on the whole there is consistency between both primary and secondary data, and between union and management perspectives, which suggests a negative pattern match with the second data category i.e. that attitudes have not deteriorated towards partnership as the organisation has endured successive and significant organisational change, but rather a deep trust of each side and a commitment to the partnership throughout the organisation is evidenced. This has strengthened the partnership and improved employee engagement, which has been utilised as a tool to manage change and improve working lives within the Trust.

4.2.3 Did the partnership improve the management and acceptance of organisational change?

The secondary data pertinent to whether the partnership between the Trust and its unions has improved the management and acceptance of change, attribute a range of benefits that the partnership has produced for the organisation and its people. The primary data is supportive of the secondary data, from both union and management representatives stating various benefits from partnership. Therefore, there is very high consistency across the data from primary and secondary sources and between union and management perspectives, which suggests a positive pattern match with the third data category i.e. that the partnership between the Trust and its unions has improved the management and acceptance of change, and goes further to evidence that they have approached the management of change in true partnership, sharing the responsibilities of decision making and the problems that organisational change causes; and that they see their partnership as fundamental and critical to good change management within the Trust.

4.2.4 Did significant organisational change affect the partnership detrimentally?

The secondary data pertinent to the Trust's history of organisational change between the years 2000 and 2007, and the effects that this organisational change has had on the partnership, provides minimal data. However it does demonstrate that staff involvement was seen by the Trust and its partnership as key to a successful response to change. The primary data evidences the significance and degree of change within the Trust with reports across all questionnaires of merger, TUPE arrangements, radically different work practices and changes to terms and conditions, and concurs with the overriding sentiment found in the secondary data that overall partnership was seen as a benefit to the organisation, unions and employees. It is clear that the partnership did its best to address anxieties and sensitivities via the partnership approach and that generally the change climate did not affect the partnership detrimentally due to the efforts made, because it was seen as being of significant value. Therefore again a good consistency of data has been evidenced across both secondary and primary data sources and both union and management key informants, which suggests a negative pattern match with the fourth data category i.e. that significant organisational change will effect the partnership detrimentally. Data is suggestive that this may be because the trust has recognised that sometimes the aims of the organisation run contrary to the desires of individuals which can create pressures, and that there is a general awareness of this danger amongst those involved in the partnership, as evidenced from the detailed responses from all key informants across both union and management representatives to question 11 which requests information on the pressures within the organisation. This awareness may have allowed the partnership to endure throughout this

continuum of change undamaged and has continued to demonstrate benefits to the organisation, its staff and the public that receive healthcare services from this Trust. But it is of note that the Trust has managed to avoid compulsory redundancies thus far, and if this proves impossible in the future, there is a question of whether the partnership would prove so robust to detriment if this were the case.

4.2.5 How strong is this partnership, and how has it withstood the pressures of organisational change?

To study data pertinent to the strength of the partnership, it is appropriate to look solely towards the primary data, and in particular that held within the key informant questionnaire questions 4 to 6, which provide the information that enables formation of opinion of the 'robustness' or 'shallowness' of the partnership in relation to Oxenbridge and Brown's typology (2004b), against the working hypothesis that a 'robust' partnership would indicate a strong partnership. The positive response from key respondents to the criteria, and with high union membership density of 71-80%, suggests defining the partnership at the Trust as 'robust' and therefore in the terminology for this study 'strong'. Both the secondary and primary data provides evidence of whether the 'strength' of the partnership in this case was sufficient to prove robust to organisational change. What is prominent across the secondary data presented is the breadth and extent of this partnership within the Trust; there are documents to formalise the partnership; a myriad of roles within the partnership both at board and representational level; and a formal framework of workplace representation. Primary data informs that despite ongoing organisational change the partnership has remained intact, and more than survival, there is evidence to suggest that this partnership has strengthened during or because of organisational change. Therefore again there is present a good consistency of data both across primary and secondary data sources and between union and management key informants, which suggest a positive pattern match with the fifth data category i.e. that a 'strong' partnership is more likely to prove robust to organisational change. Data points to the partnership having provided a significant contribution to the management of change within the organisation, which in turn has released benefits.

4.2.6 Analytical summary

In summary therefore, in the case of the partnership of the Trust, the analytical discussion above suggests that a positive pattern match has been identified with two of the data categories in this study – partnership improves the management and acceptance of organisational change; and – the stronger an employer-union partnership is, the more robust to organisational change it will prove. However, a negative pattern match with three

of the data categories in this study have been identified – managements cynical approach to the creation of partnership; - management and union attitudes deteriorate towards partnership following organisational change; and – significant organisational change will affect the partnership detrimentally.

4.3 Pattern matching analysis and Discussion for the Royal Mail

Table 4.2 - Pattern Matching – Royal Mail

Positive Match	Negative Match
Managements 'cynical' approach to the creation of partnership using partnership with unions as a necessary tool to overcome substantial restructuring, headcount reduction, severe industrial conflict and help to deliver change	
Secondary data – published studies and articles	
<p>The Sawyer report reviews industrial relations within the Royal Mail and is the catalyst for the establishment of partnership working within the organisation. It's pre partnership review demonstrates the origins for recommendations for partnership working. Phrases to describe the culture commonly were <i>"bullying and macho"</i>. One union representative told us: <i>"everyone bullies everyone else; senior managers bully junior managers; junior managers bully employees; employees bully each other."</i> (Sawyer et al 2001:48)</p>	<p>" What struck us as fundamentally different was the quality of leadership on union and management sides. In both centres there was a shared appreciation of the responsibility of both parties to co-operate in achieving the goals of the business and that doing so would be in the interests of employees as well as management. There was also a shared feeling of responsibility to the customer." (Sawyer et al. 2001:52)</p>
<p>The Sawyer report makes several main recommendations, the first of which is to stop all industrial action, to allow for a "breathing space during which our proposals for effecting a real change in the employee relations culture of royal mail, by the introduction of partnership ways of working, can be implemented." (2001:148) in order to effect the secondary main recommendation, which is one of changing the culture by the introduction of partnership working; "the aim is to create a climate in which management and union work together to further the aims of the business and in which the</p>	

disagreements which inevitably occur are resolved in an orderly and non-confrontational manner." (Sawyer et al. 2001:155)	
Made up from Royal Mail managers, CWU and CMA officials (Sawyer et al. 2001), representatives from local business, customers and officials from other trade unions <i>"The partnership boards would not replace existing procedures for negotiation or be a dispute resolution forum. Their role would be to promote measures which help build trust and confidence between management, union and employees."</i> (Sawyer et al. 2001:157)	
<i>"An independent review of employee relations at the Royal Mail calls for an immediate end to all industrial action, backed by the introduction of alternative methods of dispute resolution, and for management and the CWU to adopt a partnership approach to dealing with change. If they do not, then 'there is little hope for the future success of the Royal Mail', the review body believes"</i> (IRS Employment Review 2001:2)	
<i>"In May 2001 the industrial relations climate in Royal Mail was dire. There had been significant increase in unofficial industrial action, which had resulted in a breakdown in relations and a complete lack of trust and respect between management and union members at all levels of the organisation. Against this background, Royal Mail and the CWU jointly requested that an independent review be carried out to assess the unstable industrial relations situation and recommend changes for the future."</i> (Hammond 2005:26)	
Primary data – questionnaire – Q7	
Union Questionnaire A agrees with the origin of partnership working at the Royal Mail as the Sawyer report, which followed a period of unofficial industrial action by the CWU. The approach was to include management, unions and customers at the national and operational level. (Appendix 3 – Q7)	Appendix 3 – Management Questionnaire B – <i>"We have a formal recognition and procedural agreement with the union. It covers how we work together as partners to create positive working relationships. This agreement itself came about as the result of collective bargaining with the union."</i> (Appendix 3 – Union questionnaire B – Q7)
Management Questionnaire A states that in May 2001 the industrial relations climate was dire and had resulted in unofficial industrial action, and a complete breakdown in relations, trust and respect between management	"The union made a good business case to become involved in the partnership and demonstrated that working together was better for all

and union members across the organisation. Against this background the Sawyer report was initiated, following a request from the organisation and the CWU, of which the main recommendation was the initiation of partnership working (Appendix 3 – Q7).	stakeholders, union, employees, customers and the business itself.” (Appendix 3 – Union Questionnaire E – Q7)
Union Questionnaire B states that the partnership initiative resulted from the Sawyer report, which followed a time of ‘dreadful’ industrial relations with many unofficial strikes in the late 1990s and early 2000s. There were also high levels of bullying and harassment. Some useful progress was made via partnership working, such as the initial period of calm in industrial action, but the partnership never took off. He goes further to state that the lack of trust and respect undermined the project, as did the business size of Royal Mail and the history of poor industrial relations. Some common ground was established via the DRAW initiative, creating a shared vision, trust and ownership. (Appendix 3 – Q7)	
Union Questionnaire C reports that following an industrial relations crisis in Royal Mail, Lord Sawyer conducted an independent review. The recommendations of which included that Royal Mail and the unions (CWU and CMA) should seek to engage in partnership working. Union Questionnaire C goes on to say that this recommendation was controversial for the CWU as they saw this as an action a union would only engage in if they were in a weak position, and the CWU was a strong union. However working groups were set up across the Royal Mail to examine all aspects of these issues. (Appendix 3 – Q7)	
<i>“Increase in unofficial industrial action led to independent review of IR by Lord Sawyer who recommended establishing partnership.”</i> (Appendix 3 – Union Questionnaire D – Q7)	

Management and Union attitudes deteriorate towards partnership following organisational change, exhibited by cynicism, distrust and anger

Secondary data – published studies and articles

<p>"The CWU pulled out of the (partnership) boards in November after a row with management. Sawyer told PM that only four of the 17 pilots were still fully functioning.... CWU deputy-general secretary John Keggie said that the union had pulled out of the pilots because Royal Mail had acted outside of the partnership agreement by not consulting with them over a new bonus scheme. 'You cannot work in a partnership where one partner treats the other with contempt and disrespect' Keggie said."(Roberts 2003: 8)</p>	<p>"Dave Ward, the Communication and Workers Union's deputy general secretary for the postal division, isn't convinced that there has been a widespread change in management behaviour.... believing that much of the culture change is occurring at a senior level and still needs to filter through in some areas."(Roberts 2005:28)</p>
<p>" Talk of the financial and organisational collapse or implosion of Royal Mail has always been rather fanciful. The organisation has enduring resilience because of economic, social and political needs on the part of the business and domestic customers and the state. Such talk has had much more to do with trying to create bogeyman to heighten bargaining leverage over postal workers and their union. We need only recall how the world did not change, as Royal Mail thought it had, after the rejection of official national strike action in November 2003 because of the semi-national strike action that arose out of disputes in London a few weeks later. The CWU sensed the pendulum had swung back to them and took advantage of this. This one example indicates not only the continuing sense of trench warfare but also the fluidity in Royal Mail's industrial relations." (Gall 2004: 2)</p>	
<p>"In November 2001, the CWU suspended its involvement in the partnership initiative, citing a unilateral announcement by Royal Mail that it would introduce a new employee share scheme – which the union saw as divisive – and subsequently heavy-handed implementation of new attendance procedures. The CWU argued that Royal Mail's actions showed it was not committed to meaningful partnership." (Wustemann 2004:16)</p>	
<p>" The need for trust has been described as the 'underpinning foundations on which partnerships stand, and without which they are likely to crumble' (IES, 2002, pp.1-2). At the launch of partnership working mistrust within Royal Mail was endemic. The subsequent changes in Royal Mail's leadership</p>	

<p>team, and internal conflict within CWU and the resultant interaction between the parties just compounded the problem." (Hammond 2005:39)</p>	
<p>Primary data – questionnaire – Q 9 & 10</p>	
<p>Union Questionnaire A reports that many managers within the Royal Mail thought a partnership approach was threatening to their position and their right to manage, despite union assurances that they did not see their role to replace management. The partnership did not replace the formal industrial relations process, and therefore it was unlikely that any decision would undermine the managers roles. However, managers were still resistant, as they still perceived partnership as one that could undermine their status, and were not keen on sharing information. Union Questionnaire A states that this is due to this being a threat to their '<i>macho culture</i>' (Appendix 3 – Union questionnaire A – Q9)</p>	
<p>"Union representatives found little if any difference in the approach. It was still difficult to get information out of management and although there were many efforts, by all parties, to make positive progress when things got tough management resorted to type as did reps. Throughout the whole experience there was rabid scepticism within the organisation and if the approach was designed to improve trust across all the players, it failed miserably." (Appendix 3 – Union questionnaire A – Q10)</p>	
<p>Management Questionnaire A states that management had mixed reactions to organisational change, some embraced the approach, and others saw it as a direct threat and reacted negatively. There was also a perception that partnership was to deal with the softer issues, not tough management issues, such as cost and change. Some saw it as a talking shop, which could slow progress down against set targets. In essence the preferred culture was command and control and partnership working challenged this, and therefore failed. (Appendix 3 – Q9)</p>	
<p>Management Questionnaire A reports that union representatives had mixed reactions to organisational change; CMA has tried to embrace the opportunity, but CWU saw it as a means to usurp their role and therefore a threat. The decision to keep partnership separate from negotiation</p>	

mechanisms, and when it seemed to stray into these areas it was quickly challenged. Therefore the groups talked, but had little muscle to make decisions, and against a background of mistrust, were ineffective (Appendix 3 – Q10)	
Management Questionnaire B states that in his view the focus needs to be on how we do things successfully, rather than whether we need to do anything. The current recognition agreement is out of date and needs to be streamlined so that we don't get bogged down in issues that could be dealt with via local consultation. We need to get better at consultation, and be more confident at listening to our union representatives and take their views into account. We need to get to the point where we can show that change is made more effectively with union involvement than would be otherwise. (Appendix 3 – Q9)	
Management Questionnaire B also states that some activists have a tendency to feel that change can only happen with the permission of the union i.e. if it doesn't agree then therefore it shouldn't happen. We recognise that when unions are involved we often implement change in a better way with better results, but in discussions the point is missed and arguments grow. Our people are loyal to the unions, and the union is a stakeholder in the future success of the company. We need to get better at helping them to play their role more successfully, and therefore use this joint commitment as a channel for effective change rather than protecting the status quo. (Appendix 3 – Q10)	
<i>"These matters were dealt with in the normal industrial relations way with negotiations and bargaining rather than in a truly partnership way. It made all parties revert to 'type'". (Appendix 3 – Union Questionnaire B – Q9 & 10)</i>	
<i>"I believe that senior national managers genuinely believed in the idea, but this was not widely shared at grassroots level. The same could probably be said about the CWU. There is a joint lack of trust and mutual suspicion in the business and union. Both sides found it hard to really open up with each other.</i> <i>Therefore a lot of the work on developing a 'partnership approach' focused on issues where the parties had a common agenda. The most obvious, and</i>	

<p><i>probably most successful strand being the Dignity and Respect at Work (DRAW) initiative. The main problem with focusing on the issues where all parties were in agreement, meant that the hard-edged stuff was never tackled."</i> (Appendix 3 – Union Questionnaire C – Q 9 & 10)</p>	
<p><i>"I believe Royal Mail Board decided that partnership was not way forward to effect quick change or progress" and "At a senior level the Union changed policy and no longer wished to pursue partnership."</i> (Appendix 3 – Union Questionnaire D – Q9 & 10)</p>	
<p>When commentating on how organisational change has affected management attitudes Union representative E states, <i>"It depends on which tier of management you are talking about in any particular circumstance. But, if we were to speak about Board level attitudes, then it appears to be one of We are in charge of this change, we have the backing of the Government, we know what needs to be done and you don't, we will continue to consult with you in partnership, but in the end we are the bosses and we intend to make the decisions based on what we think is best for you. Plus, they must have an agenda to work to that we are not privy to. Otherwise we could work in real partnership to meet the challenges ahead."</i> (Appendix 3 – Union Questionnaire E – Q9).</p>	
<p>When commentating on how union representative attitudes have changed with the pressure of organisational change, Union representative E states <i>"I suppose that it is inevitable that most people will revert to parochial self interests when faced with massive organisational changes and under the circumstances most of them have lost faith in Royal Mail managements commitment to the sense of partnership working. However, a majority of the representatives still believe that once the message gets through to the political masters, who are pulling the strings on this, then they also will see that proper partnership working is the best way forwards. Time and the timing of General elections may very well tell, who knows?"</i> (Appendix 3 – Union Questionnaire E – Q10)</p>	

Partnership Improves the management and acceptance of organisational change

Secondary data – published studies and articles

<p>"We have got better relationships with our people and the union, and we've built the infrastructure to do the things we need to do". (Roberts 2005:28)</p>	<p>Royal Mail management considered the moratorium a disaster. He comments <i>"The moratorium on Industrial and Executive action meant an embargo on change – days lost to industrial action may have been greatly reduced but the end result was a financial disaster for Royal Mail."</i> (Hammond 2005:34)</p>
<p>" At the end of December 2002, 91.7% of all first class letters had been delivered on target in the current financial year. This is compared to 89.4% in the previous year, a clear and sustained improvement." (Sawyer 2003:5)</p>	<p>" Ironically, Ward, CWU, supported this view, 'What clearly worked from a union perspective was the moratorium on both industrial action and executive action. This helped the unions rather than Royal Mail as it stopped them moving forward on key issues and enforcing change without the union having to resort to traditional means of industrial action.'" (Hammond 2005:34)</p>

Primary data – questionnaire – Q12 & Q13

<p>Appendix 3 – Union Questionnaire A – Q12 reports that partnership has helped the Trust to maintain a good union relationship through redundancy.</p>	<p>Appendix 3 – Union Questionnaire A – Q12 reports that the partnership did not improve greater employee acceptance of change.</p>
<p><i>Union Questionnaire A reports that there have been a large number of redundancies over the last few years, all of which have been achieved via voluntary means. The voluntary option would have been more difficult to agree without partnership working, and this demonstrated to me that the sharing of information and opportunity to influence decision making can be fruitful.</i> (Appendix 3 – Q12)</p>	<p>Appendix 3 – Management Questionnaire A – The response to Q 13 reports that the partnership has been of minimal value to the Royal Mail and Unions, as the partnership was not given sufficient time to demonstrate a benefit. Additionally, it is reported that the partnership did not benefit either, as they were the victims of the poor management and unions behaviours, which in turn has created a poor industrial relations climate.</p>

Appendix 3 – Management Questionnaire A – Q12 – reports that partnership has helped to improve good union relationships through redundancies.	<i>"However this was not turned into a new way of working within the organisation. Partnership is another initiative that Royal Mail has tried and moved away from because of its inability to persevere with the approach."</i> (Appendix 3 – Union Questionnaire A – Q12)
<i>"The principles behind partnership working still hold true. It did encourage both sides to share information and ideas for change. Whilst the approach floundered I believe it did give some foundations for improved relationships, which have helped in recent redundancy discussions."</i> (Appendix 3 – Management Questionnaire A – Q12)	Appendix 3 – Management Questionnaire A – Q12 reports that the partnership did not improve greater employee acceptance of change.
<i>"Benefits for the Organisation and Unions have only been in respect of the DRAW initiative where it has provided a real opportunity for all parties to work together for the common good both at national and local levels. However this activity is not badged with the 'partnership' label"</i> (Appendix 3 – Union Questionnaire B Q13)	<i>"We still have too many who feel further change is discretionary and something that can be rejected if the price is not right. The mindset is that we can walk away from it if the change is not bought at an acceptable fee"</i> (Appendix 3 – Management Questionnaire B – Q12)
<i>"DRAW (Diversity and Respect at Work) has helped make Royal Mail a better place to work for employees".</i> (Appendix 3 – Union Questionnaire B - Q13)	Union Questionnaire B reports that the Royal Mail partnership has not helped employee acceptance of change or maintenance of good union relationships through redundancy, due to the fact that the partnership does not exist, other than in the respect of the DRAW initiative. (Appendix 3 – Union Questionnaire B– Q12)
<i>"Some benefits to date, some disbenefits for all involved. It has enabled us to achieve massive improvements in the reliability of our service and protect our financial viability. That has meant no compulsory redundancies and real pay increases since 2003."</i> (Appendix 3 – Management Questionnaire B – Q13)	Union Questionnaire C reports that the partnership initiative has only dealt with issues where there was already a common agenda, so it has had no impact on the hard edged issues, such as the business plan. It has delivered on change through agreement with unions, such as good voluntary redundancy packages (Appendix 3 – Q12)
Overall the partnership has <i>"assisted greatly on helping change the culture of bullying and harassment in the industry via the DRAW initiative, but not much else, " for the Royal Mail, Unions and employees."</i> (Appendix 3 - Union Questionnaire C – Q13)	Union Questionnaire D reports that the partnership made very little difference to the management of organisational change, partly due to the fact that partnership has now been formally abandoned by both parties. (Appendix 3 – Union Questionnaire D – Q 12)

Union representative E states that the Organisation has benefited from the partnership with its ability to test our new ideas in a safe environment where assumptions are challenged at a practical level. Unions have benefited as the partnership allowed Unions to test their rationale and to become part of the decision making process, to consider how new ideas benefit the business and impact upon their membership. Employees have benefited as they reap the rewards of sound business and commercial decisions being made with them in mind at all times. A happy and contented workforce is a productive and stable workforce. (Appendix 3 – Union Questionnaire E – Q13)	Union Questionnaire states that there were no benefits from partnership for the Royal Mail, the Unions and for the employees – (Appendix 3 – Union Questionnaire D – Q 13)
	Union Questionnaire E reports that there have been some benefits from partnership working. For the unions; a better commercial awareness of the business and rationales for decision making; it has also allowed unions to challenge the rationale and ensure options are considered prior to implementation. It allows decisions to be fully tested prior to implementation and challenging assumptions. Union Questionnaire E however, goes on to state that management are not open to testing their decisions via this process commonly. (Appendix 3 – Q12)
	Appendix 3 – Union Questionnaire A – the response to Q13 reports that the partnership has not been of value to the organisation, unions or the employees, and adds that the majority of employees have probably been ignorant of the attempts at partnership that were tried.
Significant organisational change will affect the partnerships detrimentally	
Secondary data – published studies and articles	
Royal Mail Letters endured a massive three-year renewal project “ <i>Launched in 2002, it was the biggest programme of change at the organisation for half a century</i> ”(Roberts 2005:25)	Looking at the joint work done by the three parties.”concluded that industrial action had fallen dramatically and there was a strong high-level commitment to partnership working. The business performance has

	benefited as a result, leadership training had been increased and the foundations for partnership ways of working had been laid" (Sawyer 2003:4)
<i>" The pace is accelerating as Royal Mail gears up for the deregulation of the letters business in 2006. The organisation will face new competitors while needing to meet it's universal service obligations for letters... The organisation needs to prepare it's workforce to be able to compete for contracts and serve the commercial customer" (Roberts 2005:25)</i>	<i>" Many of the people whom I have spoken to, within both the business and the union, have credited the moratorium with giving them the breathing space to concentrate on improving the business rather than having to react to a steady stream of industrial disputes."(Sawyer 2003:5)</i>
<i>"The more far-sighted union officials and representatives, at all levels, appreciate that changes of the type which the Way Forward was intended to achieve – and further changes – are necessary within Royal Mail. But that awareness has not, in our view, been translated into a real change of attitude in the union overall." (Sawyer et al. 2001:78)</i>	<i>"Tackling unacceptable behaviour in the workplace is both the biggest challenge and the main opportunity facing royal mail, and the work being done jointly, under a respect at work banner, to deal with this is crucial.... The emphasis on grass roots change and empowering people to make a difference themselves is the right one, and should be encouraged. To this end the project team are launching respect at work groups in areas with partnership boards; small groups of volunteers charged with helping to eradicate unacceptable behaviour everywhere." (Sawyer 2003:8)</i>
<i>2005 " is the year that we really get to develop interventions that will prepare us to compete... the next change is about potentially more radical change... No one should doubt or underestimate the scale of the task we have tackled. Royal Mail is being transformed" (Roberts 2005:28)</i>	

<p><i>" The close-run decision by members of the Communication Workers' Union averted the first national strike in seven years, saving businesses and consumers from the prospect of severe disruption and extricating the company from a dispute it estimated could have cost £20m a day.... The national vote is one of the great upsets in union affairs in recent years. It is rare for members to reject calls by their leaders for a strike mandate, particularly after such intense lobbying. The result severely weakens the negotiating position of CWU negotiators, led by Dave Ward. . The Royal Mail said it was now confident that its plans for voluntary redundancies and shift changes would be completed in the next six to nine months, allowing it to turn last year's operating loss into a profit on operations of more that £100m this year.</i></p> <p><i>Royal Mail had offered a 14.5 per cent pay rise over 18 months. However all but 4.5 per cent of this would be tied to changes in working practices, such as scraping the second post delivery, which would involve job losses.</i></p> <p><i>Mr Ward had attacked the offer for having 'more strings than the Philharmonic orchestra' and demanded an 8 per cent pay increase from next month with no strings attached."</i> (Turner & Roberts 2003: 1)</p>	
<p><i>" With hindsight, it seems that the pace and volume of structural change in the period after Sawyer was too great for the fledgling partnership structure to cope with, and both sides reverted to tradition: imposition on one side and threats of action on the other."</i> (Wustemann 2004:17)</p>	
<p><i>" There is much scar tissue from recent events to heal before any kind of normality can be achieved. And this is not just true of the CWU. Royal Mail's December 2003 announcement of 3,000 managerial job cuts was described by Amicus-CMA general secretary Peter Skyte as 'a kick in the teeth' after managers' efforts to maintain service continuity during the October strikes by CWU members."</i> (Wustemann 2004:17)</p>	

Primary data – questionnaire - Q8 & Q11	
Appendix 3 – Union Questionnaire A – Q8 reports that the Royal Mail has endured significant organisational change including redundancies and outsourcing and TUPE.	<i>“We have completed the first phase of our transformation. That was done with union involvement. However we have a lot more to do, particularly as we now have access to investment that will enable us to modernise the way we work and serve our customers more effectively and efficiently.” (Appendix 3 – Management Questionnaire B – Q8)</i>
Union Questionnaire A reports that the pressure points on the partnership when undergoing organisational change were: status of role with managers and union representatives, management felt undermined; union representatives thought it was an attempt to undermine the role of the unions. This was due to some lack of clarity between the negotiation mechanisms and the partnership framework, which were to run side by side, and also that representatives were comfortable with the pre-existing mechanisms even though they were tortuous in application, they were tried and tested. (Appendix 3 – Q11)	
Appendix 2 – Management Questionnaire A & B – Q8 reports that the Royal Mail has endured significant organisational change including redundancies, outsourcing /TUPE and the introduction of radically different work practices.	
Regarding the pressure points on the employer-union partnership when undergoing organisational change, <i>“Lack of trust on all sides – wanting to run partnership in parallel to tradition collective bargaining rights, the pace of change being too quick. The boards were unable to grow and develop, to take risks, to make mistakes and rebuild. As external pressures hit – both management and unions retreated to the comfort of status quo.”</i> (Appendix 3 – Management Questionnaire A – Q11)	
<i>“Having agreed national frameworks for change the local parties were not always driven by the need to make it happen quickly and effectively.”</i> (Appendix 2 – Management Questionnaire B – Q11)	
<i>“ The Unions wanted a higher price than management were willing to pay for accepting change.”</i> (Appendix 3 – Union Questionnaire B Q11)	
Union Questionnaire C reports that Royal Mail has endured significant organisational change and adds that <i>“The most recent major changes have</i>	

<p><i>been the introduction of a single daily delivery, down from two deliveries a day in towns and city centres, the need to make efficiency savings in all parts of the business. There has also been a radical re-organisation of pay, overtime rates and allowances. The focus for the Union being on maximising basic pensionable pay and less reliance on excessive levels of overtime. This was controversial in some areas of the country.” (Appendix 3 – Union Questionnaire - Q8).</i></p>	
<p><i>“Union critics or sceptics of any form of partnership working would use any change issues as justification for not going down this route. It may have been a cheap shot but inside the CWU it was very effective as portraying those who wanted to explore the concept of some form of partnership working as soft, and prepared to sell the members out, and those opposed the tough guys who were representing the members interests.” (Appendix 3 – Union Questionnaire C – Q11)</i></p>	
<p>Pressure points on the employer-union partnership whilst undergoing organisational change were formal disagreements and strikes, the speed of change, and lack of employee buy-in. (Appendix 3 – Union Questionnaire D – Q 11)</p>	
<p>Union representative E reports that the Royal Mail have endured all of the indicated types of organisational change and adds that <i>“Massive organisational change including all of the above. Over the last five years we have lost over 40,000 front line jobs and some 3,000 managerial positions. The scale of these changes is unprecedented in British industrial history. Nothing has been left the same, every single aspect of how the Post Office used to operate has been changed in some way or another.”</i>(Appendix 3 – Union Questionnaire E – Q8)</p>	
<p><i>“The main pressure points are working to unrealistic timescales and target dates. Undoubtedly and probably above all other issues, the opening up of the mails market to competition and regulation have been the main influencing factors in all of this as Royal Mail has not been able to get itself into a position to fight off the competition effectively and poor planning and little or no investment in the infrastructure of the business over the past ten years is now taking its toll.”</i> (Appendix 3 – Union Questionnaire E – Q11)</p>	

The stronger an employer-union partnership is, the more robust to organisational change it will prove.

Secondary data – published studies and articles

"The Royal Mail and the CWU do now accept the need for new ways of working that address the behavioural issues that prevented both sides from fully embracing the principles of partnership working. The concern I share with Lord Sawyer and others is that perhaps it is too late."(Hammond 2005:44)

"The company-wide partnership project at Royal Mail is 'on-hold' while Communication Workers Union members decide whether to strike over pay. Sue Marsh, partnership manager at Royal Mail, told PM that overall the partnership pilot had come to a halt. However some partnership boards were still informally running....Marsh said that the partnership support team, headed by Lord Sawyer, would be 'hanging in there' until the present situation was resolved. 'Turning around industrial relations at Royal Mail could take up to 10 years', Marsh said."(People Management 2003: 8)

"Industrial relations at the Royal Mail will face a return to 'old adversarial ways', unless the Communication Workers Union ends its suspension of partnership working at the company, Lord Tom Sawyer has warned."(Roberts 2003:8)

"Allan Leighton (Royal Mail's Chairman) has met the CWU executive and confirmed Royal Mail's genuine commitment to partnership working. The Government and the TUC have also expressed their strong support for the initiative and their disappointment at the ongoing suspension by the CWU"(Royal Mail 2003)

Primary data – questionnaire – Q's 4 –6 & Q14

The perspective reported by Union Questionnaire C provides information that defines the royal mail partnership, via q's 1-6, as being 'robust' against oxenbridge and brown's definitions, (2004b pp. 388-402), with membership density reported at 91-100%, which has been maintained for the past 7 years and the unions are negotiated with for pay, terms and conditions and have a strong legitimate position in the organisation and extensive input into organisational decision making and active organisational support trade union recruitment. (Appendix 3 – Union Questionnaire C)

The perspective reported by Union representative A D & E provides information that defines the Royal Mail partnership, via Q's 1-6, as being 'shallow' against Oxenbridge and Brown's definitions, (2004b: 388-402). There are a mix of both 'robust' and 'shallow' indicators. On the 'robust' side, membership density is reported at 81-90%, which has been maintained for the past 7 years, and the unions are negotiated with for pay, terms and conditions and have a strong legitimate position in the organisation. On the 'shallow' side, it reports a lack of extensive input

	into decision making and lack of employer support for union recruitment. (Appendix 3 – Union representative A, D & E). This situation would confer fewer benefits on one party than the other, and a suggestion that management prevents union reps from extending their influence from exclusion from decision making and attempts to limit union membership (Oxenbridge & Brown 2004b: 192).
The perspective reported by Management representative A & B provides information that defines the Royal Mail partnership, via Q4-6 as being 'robust' against Oxenbridge and Brown's definitions (2004b: 388-402) with membership density reported at 81-90% which has been maintained for the past 7 years and the unions are negotiated with for pay, terms and conditions and have a strong legitimate position in the organisation and extensive input into organisational decision making and active organisational support trade union recruitment (Appendix 3 – Management Questionnaire A & B)	<i>"We are not post organisational change. We have done part one but there is a lot more to come. Some on both sides might prefer that not to be the case and have not yet become fully committed to making change happen as quickly and effectively as we can. We need to build a lot more confidence and capability".</i> (Appendix 3 – Management Questionnaire B – Q14)
	The partnership " <i>... does not exist as originally envisaged</i> " (Appendix 3 – Union Questionnaire B – Q14)
	<i>"Sadly, I don't believe (the partnership) has had any long-term positive or lasting impact apart from the DRAW initiative. In many ways the attempt has run its course, we are now engaged in a national dispute. Trust and change is at the heart of the dispute. A new initiative will be needed at some point in time."</i> (Appendix 3 – Union Questionnaire C – Q14)
	Union representative D relates that the partnership has not survived organisational change as it no longer exists (Appendix 3 – Union Questionnaire D – Q 14)
	<i>"It changes in line with organisational change. Plus the names in the frame change just as often so it is mercurial in character, but overall I would say that it is maturing, but has a long way yet to go"</i> (Appendix 3 – Union Questionnaire E – Q14)

4.3.1 Did management cynically approach the creation of the partnership?

It is evident across all data that the origins of the Royal Mail partnership lay in the Sawyer Review, which became the catalyst for the establishment of partnership boards, at both national and local level, across the Royal Mail. However, the partnership arrangement was not to replace existing procedures for dispute management and negotiation, but rather to focus on promoting measures to help build trust and confidence between unions, management and staff i.e. effect cultural change of the employee relations climate and an end to the bullying culture of the Royal Mail; and for management and the CWU to adopt a partnership approach to change management. However, the breakdown of trust prior to the establishment of partnership was still endemic, and the CWU saw partnership as a threat. There is an undercurrent of data suggesting that the partnership boards were unsuccessful from a fairly early stage in their life and that CWU had gone into the partnership with relatively high levels of concerns due to the perceived controversial nature with members. The totality of this evidence suggests a positive pattern match with the first data category i.e. the Royal Mail partnership has clearly created the partnership as a necessary tool to overcome severe industrial conflict and help to deliver change, however, whether this is cynical approach to partnership, and therefore a misuse of the partnership concept or a matter of good organisational and industrial relations management by the Royal Mail, is a matter of ambiguity.

4.3.2 Did management and union attitudes deteriorate towards partnership?

The secondary data pertinent to the Royal Mail's management and union representatives deterioration of attitudes towards the partnership focuses on the 'collapse' of the partnership, barely six months since its creation, when the CWU pulled out of the partnership boards after a row with management. It is clear from both the secondary and primary evidence that mistrust was endemic between management and unions, which affected internal conflict and partnership acceptance. Overall it becomes clear from the primary data that the partnership got off to a shaky start, with deep mistrust and suspicion evident, despite some positive progress made where parties had a common agenda, in particular in regard to the Dignity and Respect at Work initiative (DRAW). However, even work on these areas were not without their problems with conflict arising as soon as differences were identified. The data goes further to suggest that this focus on areas on agreement meant that the work was at the periphery of concern and therefore the more key issues were not tackled. Despite this focus on the less critical issues, notwithstanding it is clear that the bullying culture within Royal Mail was significant and needed addressing, it is clear from the data detailed here that there was

significant deterioration to management and union attitudes as they underwent organisational change, to the extent the partnership failed (although some boards and work has carried on). This suggests a positive pattern match with the second data category i.e. that attitudes have deteriorated towards partnership, to the extent that the mistrust and suspicion, rife within the Royal Mail, has fatally wounded the partnership arrangements within the organisation. Ambiguous within this outcome, is that it is clear that CWU and CMA Amicus, the two unions, have a clear strategic difference in their approach to partnership and working with management on organisational change, however through the primary data both CWU representatives (Union representatives C and D) and the CMA Amicus representatives (Union representatives A, B and E) state similar levels of mistrust and similar perspectives of the closed nature of the management of Royal Mail and the ineffectiveness of the partnership at dealing with the real issues.

4.3.3 Did the partnership improve the management and acceptance of organisational change?

It is ambiguous whether the secondary evidence does help to establish whether the partnership between the Royal Mail and its unions have improved the management and acceptance of change, as all the data presented in this section postdates CWU's withdrawal from the partnership, and therefore it is doubtful whether the claims made of better relationships; and improved delivery targets are directly attributable to the partnership. However, we do learn that the moratorium for industrial and executive action that was part of the start up plan for the partnership was considered a disaster for management and a benefit for unions, due to the embargos delay to change implementation. The primary data suggests that the partnership did not help greater employee acceptance of change, but some benefits were identified. The DRAW initiative, in particular, is a work strand that is referred to, where it is clear that it is an initiative that is valued and has made a real difference across the organisation, and it is interesting therefore, that DRAW is not badged with the partnership label (although Lord Sawyer is clearly aiming to provide for this valuable work the support of partnerships boards where possible). Therefore the data is mainly consistent; although there is some difference of perspective between the management and union side on whether partnership helped to maintain good union relationships overall; which suggests a negative pattern match with the third data category i.e. that the partnership between the Royal Mail and its unions has not improved the management and acceptance of change, due to a breakdown in the partnership and high levels of mistrust within the organisation, although other benefits have been made by the formation of the partnership and the Sawyer review. What is evident throughout the primary data is a level of frustration on both union and management sides, with the breakdown of the partnership and a recognition that it has moved on industrial relations within the Royal Mail to an extent; with recognition that it would

have been difficult to achieve in the Royal Mail culture; and frustration that partnership has not been given a real chance within the organisation.

4.3.4 Did significant organisational change affect the partnership detrimentally?

It is evident from the secondary data pertinent to the Royal Mail's history of organisational change between the years 2000 to 2007 that the rate of change within the organisation has been phenomenally high, with a three-year renewal programme for Royal Mail letters launched in 2002; and instigation of 'The Way Forward' which encompassed the standards, conduct and business performance, all of which were designed to gear up the Royal Mail for the deregulation of the letters business in 2006. Primary data details the effect that this has had on the partnership, stating the main perceived threat for managers and unions being an undermining of status and roles; and, it is clear that unions used any change initiative as a lever for high negotiation stakes. Ultimately the partnership failed, and both secondary and primary data illuminates the reasons behind this failure, stating them as lack of trust, running partnership separately to collective bargaining; and pace of change. The data, both primary and secondary, has provided a high level of consistency of information that promotes a suggestion that there is a positive pattern match with the fourth data category i.e. that significant organisational change will effect partnership detrimentally. Data suggests that this has occurred due to the immaturity of the partnership arrangements within the Royal Mail; to an extent due to the high levels of mistrust and cynicism within the organisation that had not dissipated, which was brought to a peak by the unprecedented degree of organisational change; and perhaps, this was not helped by the creation of a partnership that only focused on change issues, such as organisational change, cultural change etc. and not one that also encompassed collective bargaining and negotiation.

4.3.5 How strong is this partnership and how has it withstood the pressures of organisational change?

To study the data pertinent to the strength of the partnership, it is appropriate to look solely towards the primary data, and in particular that held within the key informant questionnaire questions 4 to 6, which provide the information that enables formation of opinion of the 'robustness' or 'shallowness' of the partnership in relation to Oxenbridge and Brown's typology (2004b), against the working hypothesis that a 'robust' partnership would indicate a strong partnership. Here the data is not consistent, with there being a key difference between both management and union key informants, although there is a general level of consistency across the two unions on the union perspective. It is suggested therefore that this conflicting evidence provided is an indicator of the weakness in the partnership in the Royal Mail, when

the management believe that the partnership has a level of mutuality in decision making and legitimacy that the unions do not. Additionally the lack of both input into decision making and support for union recruitment would define the partnership, by Oxenbridge and Brown parameters as 'shallow', and therefore 'weak' in the terminology of this study, as it would confer more benefits on one party than the other (Oxenbridge & Brown 2004b: 192). Both the secondary and primary data provides evidence of whether the 'weakness' of the partnership in this case was a critical factor in it's ability to withstand, or not, the pressures of organisational change. Secondary evidence demonstrates that attempts at partnership working were still ongoing, at least in 2003, but that ultimately these efforts have failed. The primary data provides illustrative detail on the failure and whether there is a future for partnership within the organisation, stating that the partnership no longer exists in its planned form, and that it has had no long term impact apart from DRAW. However, there seems to be a remaining appetite for a partnership arrangement within the organisation despite the challenges ahead. Overall it is evident that the partnership has failed to fulfil its proposed shape, influence and remit, although some areas of partnership working remain, and produce work that is valued such as the DRAW initiative. The reasons for it's failure are in line with those that effected the partnership i.e. immaturity, existing level of conflict, mistrust and cynicism and the unprecedented levels of organisational change. The starting point for the partnership as a 'shallow' or 'weak' partnership, where mutuality was not clear, and the unions feared that partnership would undermine or negate their influence, clearly was a critical factor, and to that end it is suggested that this is where the Royal Mail should start, if they were to attempt to pursue establishing a true partnership again with their unions, CWU and CMA Amicus.

4.3.6 Analytical summary

In summary therefore, in the case of the partnership of the Royal Mail, the analytical discussion above suggests that a positive pattern match has been identified with four of the data categories in this study – management cynically approached the creation of the partnership to overcome severe industrial conflict and to help deliver change; management and union attitudes deteriorated towards the partnership following organisational change; significant organisational change affected the partnership detrimentally; and, the stronger a employer-union partnership is, the more robust to organisational change it will prove – in this case, starting with a 'shallow' therefore a 'weak' partnership was critical in the partnerships failure. However, a negative pattern match with one data category has been identified, that of; partnership improves the management and acceptance of change.

4.4 Comparison of case study organisation's emerging patterns

The comparative pattern-matching table below, (see table 4.3) demonstrates that there are areas of great difference between the two organisations' partnerships, and their individual success. This was to be expected as case study organisations had been identified with the objective of securing those that could illustrate the extremes of partnership, both the strong and successful, as in the case of the Trust; and the weak and struggling, as in the case of the Royal Mail. The findings of the pattern matching analysis of both the primary and secondary data were organised against the data category headings that reflected the theoretical models, hypotheses and objectives of this study, to improve facilitation of analysis. Throughout this chapter the wealth of data provided by the key informants in each case study organisation has been referred to extensively, and due to the incorporation of secondary data into this study, this has been able to be supported on the whole from detached secondary sources.

The NHS Trust approached the creation of partnership positively, seeing the merger that created the Trust as an opportunity to start anew with incorporating the organisation's approach to employee relations, and business delivery and improvement into the culture of partnership. This was embedded into the organisation in a number of ways. The Trust's management and unions worked closely together on change related projects to make change positive and improve working lives within the Trust, there was no evidence of any deterioration of attitudes whilst change was ongoing, and rather a deep trust between management and unions has developed since the partnerships creation in 2001. There is a widely held perception from both management and union participants that managing change via the partnership has improved the management and acceptance of change, and has delivered tangible benefits in the form of a much improved employee relations climate and corresponding case work. Moreover the Trust and it's unions see the partnership as fundamental and critical to good change management. These benefits have been delivered despite wide ranging and significant change (excluding compulsory redundancies), there have been pressures brought to bear on the partnership during the change process, but evidence suggests that these have been dealt with well, part of which may well have been the recognition of differences between the different parties of the partnership as the change agenda has developed. Against the criteria used by this study, the partnership at the Trust is 'robust' and therefore 'strong', and the evidence has suggested that the partnership has not only withstood the pressures of organisational change, but has actually evolved whilst undergoing significant organisational change into a shared commitment to success, partnership and employee engagement.

The Royal Mail approached the creation of its partnership with 'cynicism' by the definitions of this study i.e. created as a tool with which to overcome severe industrial action and to deliver

cultural change. They took the unusual approach of creating a partnership that sat alongside the traditional negotiation and bargaining activities of the union structure already within the organisation, rather than embedding these activities within the partnership, and they did so in a pre-existing climate of distrust and cynicism between unions and management, where the concept of partnership was seen by the CWU, the predominant union, as highly controversial. The partnership got off to a poor start with mixed reactions to the partnership within the organisation spanning from welcome to deep mistrust and suspicion, amongst both managers and unions. This culminated in the CWUs withdrawal from the partnership, only six months after its creation, on the premise of Royal Mail managements betrayal. The partnership seems to have been unable to deliver improved change management or employee acceptance of change, however there have been some real tangible benefits, particularly in the case of the initiative designed to tackle the ingrained bullying culture within the organisation, DRAW. Unions have seen benefits in terms of access to decision making and commercial understanding. It has become clear that the scale of change created such a scale of pressure that the fledging and fragile partnership at Royal Mail experienced significant damage, existing now only in a limited form. However this study would also argue that also key in the partnerships virtual demise was the pre-existing climate of mistrust, the immature nature of the partnership, and the separation of partnership from core union activity, which necessitated that the partnership focuses on important, but side line issues, and therefore had no bite with which to implement it's initiatives or recommendations. Against the criteria used by this study, the definition of the strength of the partnership was ambiguous, however it was concluded that the partnership should be defined as 'shallow' and therefore 'weak', despite the high union density, due to the unions perceiving a lack of input into organisational decision making and little Royal Mail support for union recruitment. It has been seen that the partnership has not withstood the pressures of organisational change well, and has all but failed in its intended form. The starting point for the partnership as one where mutuality was not clear, and where the unions feared that the partnership would undermine or negate their influence, was clearly a critical factor in this demise.

Table 4.3 - Summary Comparison of Case Study Organisations' Emerging Patterns

Positive Match	Negative Match
<i>Managements 'cynical' approach to the creation of partnership using partnership with unions as a necessary tool to overcome substantial restructuring, headcount reduction, severe industrial conflict and help to deliver change</i>	
<p>Royal Mail – here the management have candidly initiated a review into industrial relations within the organisation due to the degree of conflict within industrial relations and the culture of the organisation. The review, The Sawyer report (Sawyer et al 2001) was the catalyst for the creation of the partnership as an instrument to achieve a cultural change spanning improvement in industrial relations to reducing and correcting bullying behaviour.</p>	<p>Nottinghamshire Healthcare NHS Trust - Both primary and secondary data indicate that the Trust's management approach to partnership was positive. The partnership was created alongside the new organisation that resulted from the merger, specifically in pursuit of working together towards common goals.</p>
<i>Management and Union attitudes deteriorate towards partnership following organisational change, exhibited by cynicism, distrust and anger</i>	
<p>Royal Mail – the partnership boards do not seem to have got off to a good start in Royal Mail. Hammond (2005:39) states that working mistrust was endemic at the point of partnership launch and changes within the Royal Mail senior management was not helpful to this situation. Primary data demonstrates that there are differing perspectives from the union representatives questioned via this research, generally dividing between a more positive partnership story from the CMA Amicus representatives (now UNITE) and a more negative story of partnership from the CWU representatives, and this is a key difference that the representatives themselves are aware of and Royal Mail's management. It appears that generally the unions were suspicious of the new partnership approach as they thought that it would undermine their role within the organisation (Appendix 3 – Union Questionnaire A – Q9), which translated into 'rabid scepticism' (Q10). Ultimately the partnership collapsed in November 2001 (Roberts 2003; Wustemann 2004) as CWU, the majority union, pulled out</p>	<p>Nottinghamshire Healthcare NHS Trust - The data indicates that for the Trust, management and unions worked closely together on change projects and viewed their partnership approach as 'fundamental and crucial in working these major changes through' (Appendix 2 – Union Questionnaire A – Q9). Accordingly there is little evidence that there has been a deterioration of attitudes as change has progressed, and rather data indicates that the partnership appears to have strengthened the organisation and helped to protect employee engagement.</p>

<p>of the partnership boards with an allegation from John Keggie (deputy general secretary of the CWU) that the management of Royal Mail had treated CWU with 'contempt and disrespect' by the introduction of a new employee share scheme (Roberts 2003:8).</p>	
<p>Partnership Improves the management and acceptance of organisational change</p>	
<p>Nottinghamshire Healthcare NHS Trust – Both primary and secondary data reports a wealth of benefits that derive from the partnership and contribute to better management and acceptance of change; improving employee relations; reduction in disputes and disciplinaries; and, increased staff engagement, to name a few. The IPA paper states that the partnership helped to make the entire organisation 'increasingly receptive to change'. (IPA 2004b:8)</p>	<p>Royal Mail – Both primary and secondary data demonstrate a conflicting picture of the support partnership has provided to improve the management and acceptance of change within the Royal Mail. The management found the moratorium on industrial and executive action introduced at the inception of the partnership boards disastrous due to the fact that in reality this prevented them getting on with the required change (Hammond 2005:34). Some union representatives state that the partnership did not improve acceptance and management of change and had illustrated no benefits for the Royal Mail. It is clear that some benefits have been realised and are quantifiable, such as achieving voluntary redundancies with maintenance of good union relationships through this period, enabling unions to grow commercial awareness. But key amongst these is the DRAW project, which has been key in improving the workplace culture for employees and is the only partnership strand within the Royal Mail currently remaining, but is not classified by the Royal Mail as partnership work (Appendix 3 – Union Questionnaire B – Q13).</p>
<p>Significant organisational change will affect the partnerships detrimentally</p>	
<p>Royal Mail – The data indicates that the Royal Mail has endured significant organisational change ranging from the three year renewal project launched in 2002 incorporating cultural change and job cuts translating into redundancies, closely followed by a period of further change focusing on technology innovations to create efficiencies for the deregulation of the letters business in 2006. The primary data indicates that particular pressure points emerged such as lack of trust on all sides, mismatched expectations of a balanced outcome, formal disagreements and strikes and the pace of change being too quick. Wustemann (2004:17)</p>	<p>Nottinghamshire Healthcare NHS Trust – The data indicates that the NHS Trust has endured significant organisational change ranging from the merger itself, implementation of Agenda for Change and TUPE, but seems to have avoided compulsory redundancies. Particular pressure points emerged such as possible redundancies, new ways of working and when the aims of the organisation ran contrary to the desires of individuals. However, data suggests that the partnership has endured throughout this continuum of change, and has continued to demonstrate benefits to the organisation and its people throughout this period, instilling a 'better</p>

<p>summarises the effect the significant organisational change had on the partnership ' <i>With hindsight, it seems that the pace and volume of structural change....was too great for the fledging partnership to cope with</i>', an statement reinforced with primary data stating, ' <i>The boards were unable to grow and develop, to take risks, to make mistakes and rebuild. As external pressures hit – both management and unions retreated to the comfort of status quo</i>' (Appendix 3 – Management Questionnaire – Q11). Ultimately the partnership 'went on hold' when the CWU withdrew their support in November 2001, although some boards are still informally running and Lord Sawyer has continued to undertake 6 monthly reviews.</p>	<p><i>climate of cooperation</i>' which ' <i>resulted in better service delivery</i>' (Appendix 2 – Union Questionnaire A - Q13).</p>
<p><i>The stronger an employer-union partnership is, the more robust to organisational change it will prove.</i></p>	
<p>Nottinghamshire Healthcare NHS Trust – Against Oxenbridge and Brown's model (2004b) of robust and shallow partnerships, the Trust's partnership can be confidently defined as 'robust', as the data indicates high density of membership, and unions having wide responsibilities and the partnership taking a strong and legitimate position in the organisation and accordingly, against Oxenbridge and Brown's thesis (2004b), it has not only endured well, but has '<i>maintained and strengthened</i>' (Appendix 2 – Union Questionnaire A – Q14) and provided a significant contribution to the management of change within the organisation, in turn releasing benefits.</p>	
<p>Royal Mail – An indicator of the lack of weakness of the partnership in the Royal Mail is that union and management representatives within the primary data collected hold conflicting views on whether the partnership confers a strong and legitimate position in the organisation for the unions, with the majority of union representatives questioned reporting that this is not the case, with a lack of input into decision making. Despite both management and union agreement that membership density is very high at 81-90%, a lack of extensive input would relate into a 'shallow' partnership against Oxenbridge and Brown's model (2004b), which is an arrangement that would confer fewer benefits on one party than another, and suggests that management would prevent union representatives from</p>	

extending their influence from exclusion from decision making (Oxenbridge & Brown 2004b: 192). Overall this data suggests that the Royal Mail partnership is 'shallow' and therefore 'weak' against the hypothesis of this study, it has not survived organisational change well, lasting in it's intended form little more than 6 months, from it's inception in March and CWU's abandonment of it in November 2001. Partnership work does continue in a limited form but insufficiently to continue and grow the partnership further. Lord Sawyer warned in 2003 that *'industrial relations at the Royal Mail will face a return to the old adversarial ways, unless the CWU ends its suspension of partnership'* (Roberts 2003:8) and Hammond updates in 2005 *'The Royal Mail and CWU now accept the need for new ways of working..... that prevented both sides from fully embracing the principles of partnership. The concern I share with Lord Sawyer... is that it is perhaps too late'* (Hammond 2005:44). However, evident within the primary data collected it is clear that the partnership has not been renewed and the Royal Mail is again enduring a national dispute, with trust and change at the heart of it (Appendix 3 – Union Questionnaire C – Q14).

5. DISCUSSIONS AND CONCLUSIONS

5.1 Discussion

This dissertation describes some of the academic debate surrounding partnership in the UK, and examines the pressures that can effect partnership negatively and the problems associated with failing partnerships in an organisational change climate. It also proposes theoretical models for weak and strong partnerships, to identify and explain the variables involved in the deterioration of partnerships experiencing organisational change.

In order to test these models, an empirical study was conducted to identify the similarities and differences between two partnerships from very different organisations that had endured significant organisational change; and were at the extremes of the Oxenbridge and Brown's (2004b) typology of 'robust' and 'shallow' partnership dimensions. It was reasonable therefore, to expect that the strength i.e. 'robust' nature of one partnership, would prove more resilient to the pressures of organisational change, than the partnership that was deemed 'shallow' i.e. weak.

The study took the form of an explanatory causal comparative case study using secondary data, from academic and professional literature in the public domain; and primary data from key informant questionnaires in the Royal Mail and the Nottinghamshire Healthcare NHS Trust. The research has utilised both primary and secondary data to effectively track the progress of the partnership over the last 7 years (years 2000 to 2007) as it has endured organisational change. Non-probabilistic sampling was used, which was purposive and stratified to ensure that both sides of the employer-union partnership were represented, and whom were experienced within the partnership.

Drawn from the literature, a theoretical model was developed to illustrate and explain how organisational change effects partnerships (see figure 2.1 - Model A). To develop the theoretical model further, into one that would demonstrate clearly how the variables contributed to the problem of deterioration of partnership under organisational change, specific models were developed against the two levels of partnership, weak (see figure 2.2 for Model B), and strong (see figure 2.3 for Model C).

The variable relationships of the proposed models A, B and C, were tested through statistical analysis of qualitative data which was analysed to compare and contrast the partnerships, via a pattern matching technique; and with data, both secondary and primary, organised against the five data categories within this study, forming a matrix reflecting the variables and the objectives of this study.

Utilising the theoretical model created for the purposes of this research (figure 5.1 Model A) to look at this analysis more closely, it is clear that the study has demonstrated that the variables relate in the way the model proposes i.e. that the moderating variable of the strength of the partnership does indeed affect the strength of the relationship between the independent variable of 'scale of change' to the dependent variable of 'deterioration of management and union attitudes'. In effect the stronger the partnership, the less effect a high scale of change will have on deterioration of attitudes; the weaker the partnership the higher the effect a high scale of change will have on deterioration of attitudes. The study has additionally validated the proposed relationship of the intervening variable to explain the influence of the independent variable i.e. that the intervening variable 'managements approach to partnership creation' has intensified the influence of the independent variable, in effect, where there is a 'cynical' start to partnership, organisational change seems to have a more intensified negative effect on the partnership.

Furthermore, the models (B and C), also created for the purposes of this research, have clearly acted as a useful predictor for partnership deterioration or strength under the pressure of organisational change, proposing differing relationships between the variables for the two levels of partnership - strong and weak, and their effects on partnership. Model B, the weak partnership model, suggested that a cynical approach, would lead to the partnership becoming damaged by change, and that this would heighten the chance and degree of attitudinal deterioration. Model C, the strong partnership model, suggested that a positive approach to partnership would help survival, and lessens the influence or change on attitudinal deterioration. (figure 5.2 - Model B; and 5.3 – Model C). From the analysis of data within this study, it is therefore evident that additionally models B and C appear to be valid, and to have been upheld. Furthermore, the case study has gone further than intentional design, by explaining and illuminating the how and why of partnership deterioration and durability, and identifying variables and factors contributory to this movement of relationship. These reiterated and expanded models (see figures 5.4 and 5.5) illustrate that a more complex reality exists, with a breadth of elements contributing both to the deterioration of a weak partnership (Model B) and the stability of a strong partnership (Model C). The areas newly illuminated by this research are presented in italics, and are suggested by this study to be elements that are key to understanding how to ensure a stable and prosperous partnership between unions and employers, that could survive through organisational change.

Figure 5.1 – Model A - Diagram of the variable relationships affecting partnership deterioration under organisational change

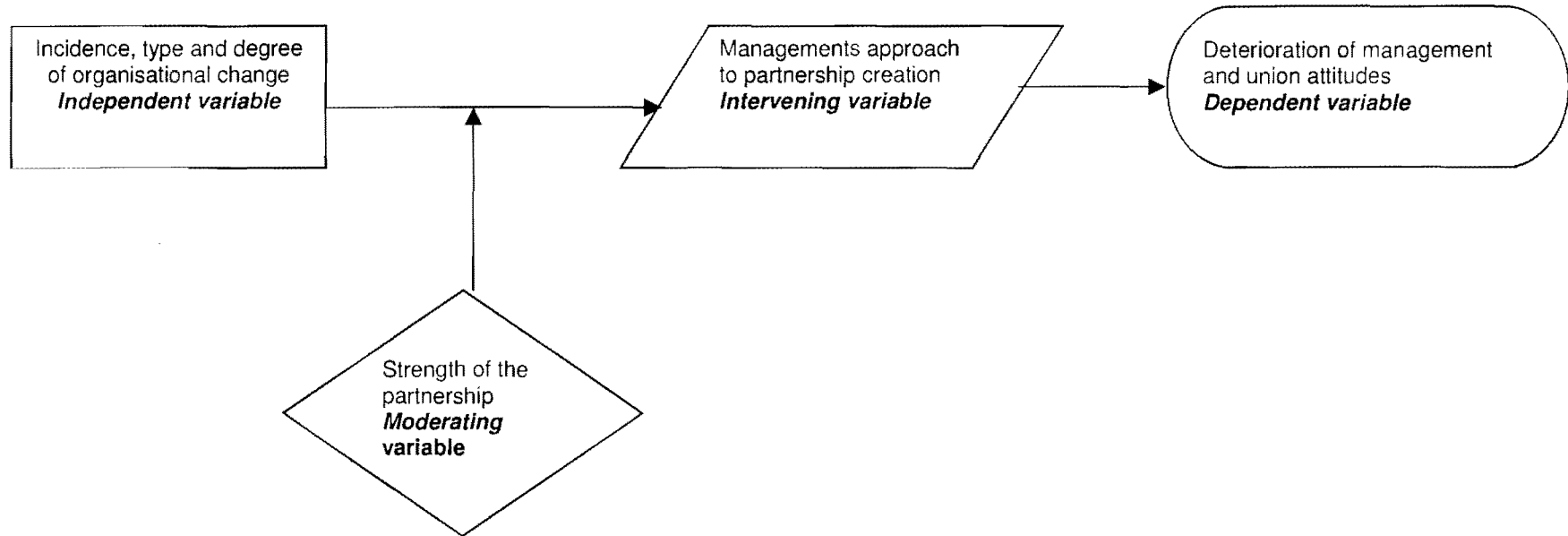


Figure 5.2 – Model B - Deteriorating factors for a weak partnership experiencing organisational change

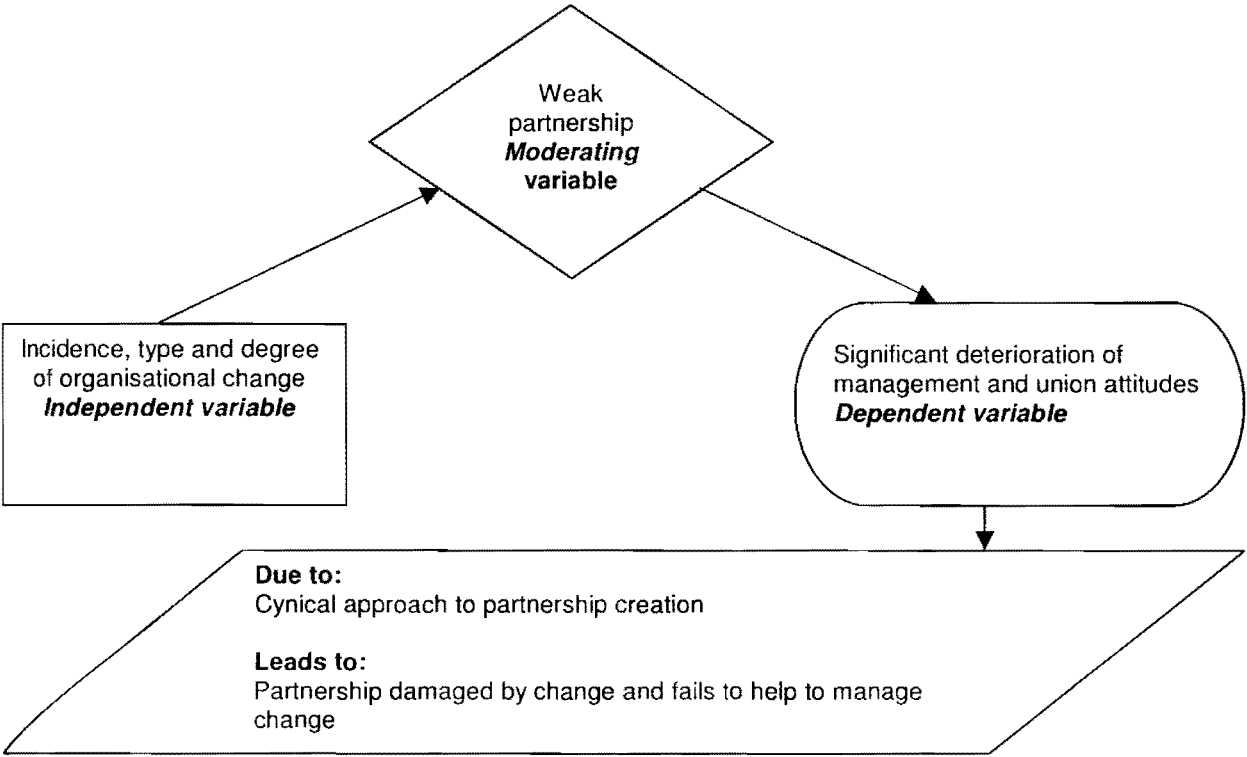


Figure 5.3 – Model C - Deteriorating factors for a strong partnership experiencing organisational change

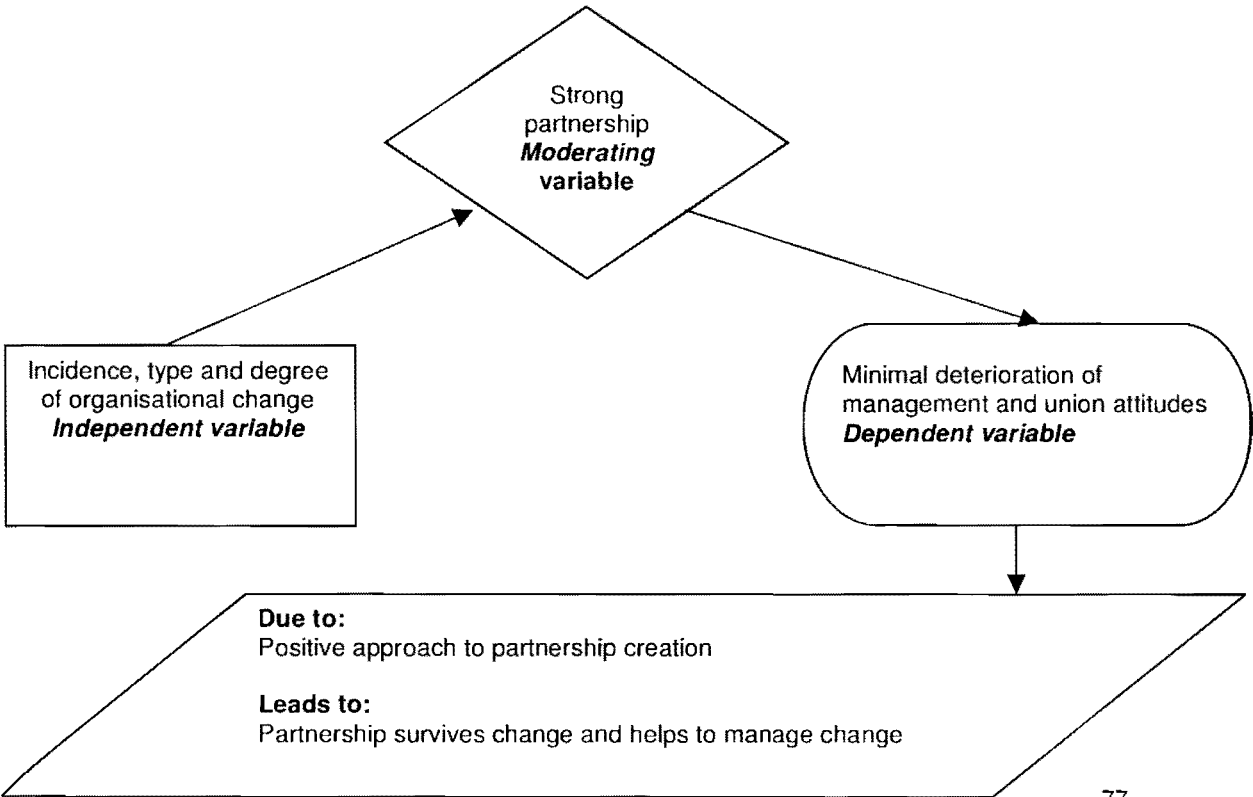


Figure 5.4 – Model B – deteriorating factors for a weak partnership experiencing organisational change - **Expanded model**

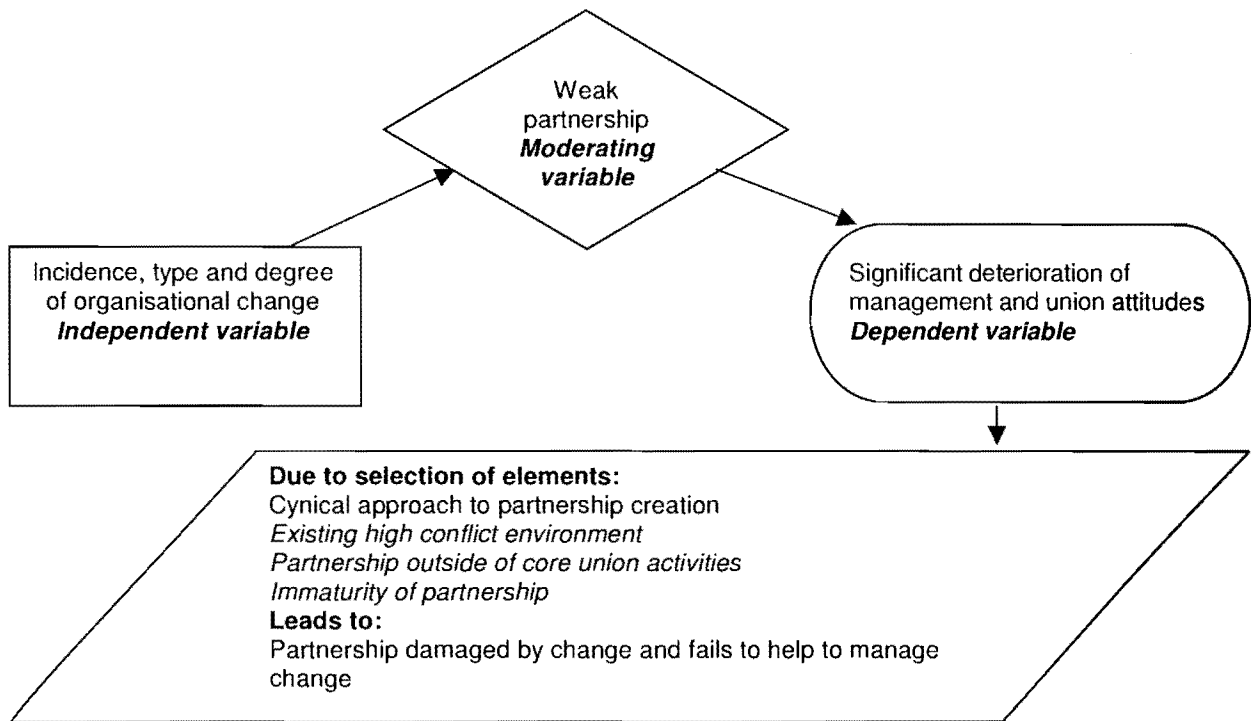
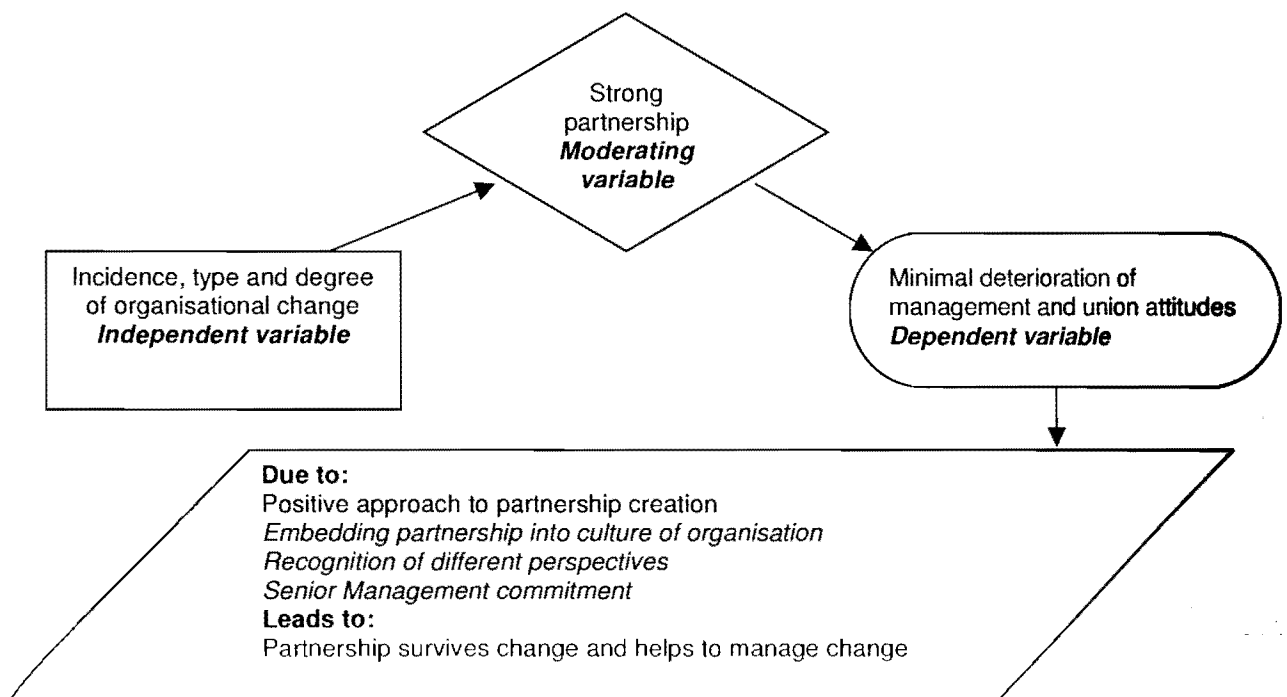


Figure 5.5 – Model C – deteriorating factors for a strong partnership experiencing organisational change – **Expanded model**



The findings suggest that the hypothesis, where deterioration of partnership is inevitable in the face of organisational change, is open to question. Rather this explanatory case study suggests a more complicated reality exists, and that there are many influences on partnership that can lead to it's deterioration, or indeed prevent it's deterioration.

The pattern matching analysis, however, does support the other hypotheses of this study:

- If the creation of a partnership is approached cynically, this can contribute to the partnership's deterioration, because this can cause distrust and suspicion in regard to the partnership, from unions and non partnership management. However this study has also demonstrated that if the management approach to partnership is positive, this can create an early climate of trust;
- Management and union attitudes can deteriorate towards partnership under the pressure of organisational change, and where this occurs this contributes to partnership deterioration. However this study has also demonstrated that this does not need to be the case, attitudes do not necessarily deteriorate where the partnership is strong, it is inevitable that pressure points will appear, but a strong partnership will look for ways to overcome them.
- The stronger a partnership is, the more robust to organisational change it will be. However, this study suggests that there are contributing factors to this robustness, such as: the embedding of partnership into the culture of the organisation and ensuring that it has an equal voice to management; by its structure, recording and reflecting in business processes; by approaching partnership creation positively i.e. with a genuine aim to gain business advantage with the creation with a true employee voice; and by recognition that pressure points will occur and providing a mechanism for management and unions to try and overcome these.

Although as part of this case study only two organisations have been studied; with the use of purposive sampling of respondents and the use of primary and secondary data, the study has been successful in studying the development of the respective partnerships over a seven year period, with a high richness of data which has provided much detail. And it has been careful to ensure that both sides of the partnership have been fairly represented, and both failure and success given equal weighting. Therefore, the findings of this explanatory case study does not offer proof that is generalisable to partnership generally, but does offer a model for both weak and strong partnerships that can and will generalise to theories and models of partnership.

5.2 Conclusions

Oxenbridge and Brown's typology of partnership (Oxenbridge & Brown 2004a; 2004b) has acted as a useful, but limited, tool with which to nominally categorise partnerships prior to analysis, and for a structure for which to draw hypotheses and propose models against. However, this research has built upon the Oxenbridge and Brown's typologies, to produce a model of the effect that organisational change has on partnership, and its contributing factors, thereby creating a theoretical model, that supports and collates many strands of academic argument in relation to partnership, and explains their effect on partnership experiencing organisational change.

In general, the analysis findings seem to confirm the general arguments of Oxenbridge and Brown (2004b: 401) that the stronger an employer-union partnership is, the more stable it would prove. For example, in the Trust, the employer chose to pursue partnership due to a perception of a *'advantage in a clear and independent employee voice'* (2004b: 401), which is in line with their expectation of a 'robust' partnership, and that a 'stable' partnership of having a positive approach to the creation of partnership and that it would continue as both sides perceive continuing net benefits, and provision of supportive recruitment and representation rights (2004b: 401). However, their arguments of the factors required to ensure stability is clearly incomplete as much of this was in place for the Royal Mail partnership; and yet it failed. The findings of this research clearly attribute this stability to some key supporting elements, providing reinforcement through the ultimate challenge of significant organisational change, which is more complex than 'good housekeeping' of a partnership, as suggested by Oxenbridge and Brown (2004b). Rather this study suggests that the factors attributing to stability through organisational change are; embedding the partnership into the culture of the organisation by reflecting the partnership in structures, processes and systems, supporting Reilly's (2001: 42-50) statement that this was a key way to develop a robust employee relations strategy that could survive the turbulence of organisational life; ensuring that there is top level commitment to the partnership, because if the partnership does not have this foundation, it will not survive crisis (Reilly 2001:68); and that there must be a recognition of different perspectives (Reilly 2001:69).

However, the Royal Mail presented data that gave a less clear picture, suggesting a definition of 'shallow' partnership (2004b: 394 & 401), despite high levels of union membership density. This began to demonstrate further that the typology presented by Oxenbridge and Brown (2004a; 2004b), although useful, was proving limited and did not encompass the extent of variables at play in deterioration of partnership whilst undergoing organisational change, and that in fact there was a much more complex relationship at work. This is largely because

Oxenbridge and Brown (2004b) expected to see instability resulting from workforce apathy or because employers curbed recruitment activity (2004b: 401), and this cannot be said to be true in the case of the Royal Mail, as it has become evident through this study, and its proposed models, that a more complex situation exists. Rather, part of the deterioration of partnership observed, can be attributed to: the immaturity of the partnership, supporting Reilly's (2001) stated expectation that only a mature partnership could be able to cope with a change programme (2001:15); preexisting high levels of mistrust, conflict and cynicism towards partnership, supporting arguments from Bacon and Storey's work (2000) with their stated expectation that the extent managers and unions are committed to undertake a partnership approach will severely limit its success; and the sheer scale and pace of organisational change, supporting both Angle and Perry's (1986) and Knell's (1999) observations; where Angle and Perry suggested that where the employee relations climate was hostile that employees were forced to choose between union and employee (1986) and Knell noted that the challenges of developing partnerships within organisations where broad and far ranging changes occur can have far reaching implications due to the stretching of capabilities of both union and management that the establishment of partnership groups can cause, and the changes that this can present to existing power structures and perceptions of job security (1999:14).

Additionally, it is interesting to note that although Government led reform has been a factor existent within both case study organisations (Deregulation of the letters market for the Royal Mail; and, Agenda for Change and Government directed merger for the Trust). This research then, challenges Tailby et al's (2004) findings, as it has demonstrated that although Government 'interference' can undermine effective change and contribute to a breakdown of trust, in the Trust's case, this has not compromised its ability to maintain a robust partnership agreement, and therefore, like other influences that pressurise partnership, the strength of partnership is key, not the type of influence.

The conclusions that partnerships do not necessarily deteriorate under the pressure of organisational change, that they can survive these pressures through a focused application of partnership strategy on both the management and union sides, is likely to have implications both inside and outside of the academic sphere:

Firstly the findings have implications for both union and management representatives considering the creation or renewal of a partnership. The results of this study provide a more realistic view of the elements necessary for partnership to endure organisational change successfully; of the difficulties that may lie ahead; and, of the mutual benefits that could be enjoyed by both organisation, unions and employees, if partnership were successful. This research therefore, could influence the partnership approach taken and improve awareness

of the requirement for an embedding strategy, therefore this research could be construed as useful guidance.

Additionally, the findings have implications within the academic sphere considering the fragility and stability of partnership. Much of academic opinion, as has been identified within this study, has a concern surrounding the long term stability of partnership (Knell 1999; Tailby 2004; Reilly 2001), particularly when under pressure, such as that that comes from organisational change. The results of this study provide a basis for understanding the partnerships can survive significant organisational change, and directly challenges those academics that see deterioration as inevitable. It also identifies those elements that are necessary to put in place, as well as identifying the pitfalls that some partnerships struggle with. This research, therefore could be a foundation upon which to base a wider study of partnership, that looks across all the key elements, to understand more fully the future stability of partnership.

Finally, the existing focus on union rights and employer recognition as the basis for defining the strength of employer-union partnerships has neglected the wider more complex variables that exist that together define a strong or weak partnership and it's chances of success under pressure i.e. those of approach – positive or cynical; pre-existing environment; embedding within the culture; etc. as proposed in the upheld and expanded models B and C (see figures 5.4 and 5.5). These validated models present an opportunity for future research, for a wider comparative case study, with the objective to generalise the findings of these models further to the wider partnership community, and also via research could be tested further and thereby could be potentially used for predictive purposes.

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Appendix 1 – Email and accompanying questionnaire sent to both Union and Management representatives

Template email to accompany questionnaires

Dear (*insert name*)

I am a flexible MSc HR management student who is currently embarking on my dissertation as a concluding part of my Masters qualification. I am writing to you at the suggestion of Derek Luckhurst of the Involvement and Participation Association (IPA), who thought you would be supportive, and willing to participate, with my research.

The aim of my research is to examine employer-union partnerships in organisations that have experienced organisational change, as one of the most enduring tests of partnership relationships, and to look at how effectively those relationships can survive significant organisational change, such as redundancies, merger, acquisitions and implementation of radically different work practices.

In order to test this thesis I am studying three partnerships from three very different organisations who have endured organisational change. (*insert company name*) is one of the organisations that I have chosen, and I am contacting you to ask if it would be possible for several people within (*insert company name*) to complete a the attached two page questionnaire.

If possible it would be helpful if a minimum of two lead union representatives and two lead management representatives could complete and return these questionnaires, the contents of which will help to inform my studies. Accordingly, the more detail that the participants are willing to provide and the more experience they have of the partnership over time, the more supportive this will be of successful completion of my dissertation to a high standard.

To this end please could you indicate your readiness to complete the questionnaire and your ability to provide the necessary participants. I am very happy to answer any questions or queries which can be made via email or by contacting me on (*insert mobile number*). For the purposes of the timing of my dissertation I will require completed questionnaires by the 31st July 2007 to the following email address sallyonline@btinternet.com.

Yours sincerely

Sally Smith

Appendix 1 – Email and accompanying questionnaire sent to both Union and Management representatives

Template questionnaire

DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within (insert organisation name) and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in (insert organisation name) In section B please tick as many boxes as apply and detail the (insert organisation name) situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☐ Union representative ☐

2. What is your formal title in your role and your organisation?

.....

3. Who employs you?

.....

4. What is the union membership density within (insert company name)?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☐ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☐ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☐

Extensive input into organisational decision making ☐

The employer/organisation actively supports trade union recruitment by providing recruitment ac ☐ at new employee induction

The union is recognised for negotiation over pay ☐

The union is recognised for negotiation over pay and non pay terms and conditions ☐

The union is recognised for consultation rights over other elements ☐

Are the union rights/responsibilities and role the same over all business units? ☐

If not how does it vary?
(Free text area)

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

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8. Indicate and describe the type of organisational change that *(insert company name)* has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input type="checkbox"/>	Outsourcing/TUPE	<input type="checkbox"/>

Free text area

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9. What effect did this organisational change have on *(insert company name)* managements' attitudes towards the partnership, and how did this affect their role in the partnership?

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10. What effect did this organisational change have on *(insert company name)* union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

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11. What were the pressure points on the employer-union partnership when undergoing organisational change?

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12. What difference has partnership made to the management of organisational change within *(insert company name)*?

Greater employee acceptance of change ☐

Maintained good union relationships through redundancy ☐

Free text area

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13. Overall has the partnership been of value and/or produced benefits to:

a. *(insert company name)*

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b. Unions

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c. Employees

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14. How has the partnership fared post organisational change?

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DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Nottinghamshire Healthcare NHS Trust and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Nottinghamshire Healthcare NHS Trust. In section B please tick as many boxes as apply and detail the Nottinghamshire Healthcare NHS Trust situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☒ Union representative ☒

2. What is your formal title in your role and your organisation?

Head of Employment Partnerships – Trust Staff Side Chair
.....

3. Who employs you?

Nottinghamshire Healthcare NHS Trust
.....

4. What is the union membership density within Nottinghamshire Healthcare NHS Trust?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☒ 81-90% ☐ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☒ 81-90% ☐ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making ☒

The employer/organisation actively supports trade union recruitment by providing recruitment ac ☒ at new employee induction

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

Are the union rights/responsibilities and role the same over all business units? ☒

If not how does it vary?
(Free text area)

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

Nottinghamshire Healthcare NHS Trust was formed on the 1st April, 2001. Since its formation significant efforts have been made between the Trust, the Trade Unions and professional organisations to develop a partnership agenda. These efforts resulted in the publication of a 'Framework for Partnership Agreement' which sets out the approach to partnership working. The Agreement identifies :

- A clear set of values to promote a culture of involvement
- A framework for change in behaviour and practice
- A process for formal business
- Trade Unions and Staff Organisations recognised for formal consultation/bargaining
- Arrangements for time off and facilities for accredited officials
- A commitment to Joint Training

According to Guest and Peccie's the principles of partnership are defined as:

- Good treatment of employees now and in the future
- Empowerment creating the opportunity for employee contribution
- Employee rights and benefits
- Employee responsibilities

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8. Indicate and describe the type of organisational change that Nottinghamshire Healthcare NHS Trust has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input checked="" type="checkbox"/>	Merger & acquisition	<input checked="" type="checkbox"/>
Introduction of radically different work practices	<input checked="" type="checkbox"/>	Outsourcing/TUPE	<input checked="" type="checkbox"/>

Free text area

.....Massive change

on all employment fronts PFI TUPE Comprehensive Organisational Change Significant Changes at Senior Management Level New CEO – Director of Finance /Director of HR and Diversity The implementation of Agenda for Change Introduction of Smoke Free Buildings and Grounds and much more

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9. What effect did this organisational change have on Nottinghamshire Healthcare NHS Trust managements' attitudes towards the partnership, and how did this affect their role in the partnership?

Huge impact - Management saw a partnership approach as fundamental and crucial in working these major changes through.

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10. What effect did this organisational change have on Nottinghamshire Healthcare NHS Trust union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

Huge impact – Staff Side saw a partnership approach as fundamental and crucial in working these major changes through.

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.....

11. What were the pressure points on the employer-union partnership when undergoing organisational change?

...Possible Redundancies – New Ways of Working – Work Life Balance for Staff – Possible changes to terms conditions of members. Significant Workload for lead reps and managers.

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12. What difference has partnership made to the management of organisational change within Nottinghamshire Healthcare NHS Trust

Greater employee acceptance of change ☒

Maintained good union relationships through redundancy ☒

Free text area

.....Good joint working – valuing and respecting roles and responsibilities looking for good and fair outcomes in very difficult and challenging times.

13. Overall has the partnership been of value and/or produced benefits to:

a. Nottinghamshire Healthcare NHS Trust

...Significant value – less grievances /disputes/ET –Better climate of co – operation – resulting in better service delivery.

b. Unions

Significant and ongoing value – less grievances /disputes/ET –Better climate of co – operation – resulting in better service delivery.

c. Employees

14. How has the partnership fared post organisational change?

Maintained and indeed has strengthened and has resulted I believe in the following.

- A joint commitment to success
- Building trust
- Recognising the legitimate Role of the Partners
- Addressing the issues of security and flexibility
- Sharing success
- Informing and consulting staff

- Employee voice and representation

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DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Nottinghamshire Healthcare NHS Trust and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Nottinghamshire Healthcare NHS Trust. In section B please tick as many boxes as apply and detail the Nottinghamshire Healthcare NHS Trust situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☐ Union representative ☒

2. What is your formal title in your role and your organisation?

...Staff side chair local services.....

3. Who employs you?

...Nottinghamshire Healthcare Trust.....

4. What is the union membership density within Nottinghamshire Healthcare NHS Trust?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☒ 61-70% ☐ 71-80% ☐ 81-90% ☐ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☒ 61-70% ☐ 71-80% ☐ 81-90% ☐ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making ☒

The employer/organisation actively supports trade union recruitment by providing recruitment ac ☒ at new employee induction

The union is recognised for negotiation over pay ☐

The union is recognised for negotiation over pay and non pay terms and conditions ☐

The union is recognised for consultation rights over other elements ☒

☒

Are the union rights/responsibilities and role the same over all business units?

If not how does it vary?
(Free text area)

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

...Negotiation

.....

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8. Indicate and describe the type of organisational change that Nottinghamshire Healthcare NHS Trust has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input checked="" type="checkbox"/>	Outsourcing/TUPE	<input checked="" type="checkbox"/>

Free text area

.....Compliance with National service framework (mental health), TUPE arrangements with regard to Learning disability residential beds.....

.....

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9. What effect did this organisational change have on Nottinghamshire Healthcare NHS Trust managements' attitudes towards the partnership, and how did this affect their role in the partnership?

...They welcomed our support and input on these issues.....

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10. What effect did this organisational change have on Nottinghamshire Healthcare NHS Trust union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

...generally a positive response.....

11. What were the pressure points on the employer-union partnership when undergoing organisational change?

...Ensuring that correct policy and procedure is followed and appropriate consultation is undertaken.....

12. What difference has partnership made to the management of organisational change within Nottinghamshire Healthcare NHS Trust

Greater employee acceptance of change ☒
Maintained good union relationships through redundancy ☐

Free text area

13. Overall has the partnership been of value and/or produced benefits to:

a. Nottinghamshire Healthcare NHS Trust
Very much
so.....

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.....
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b. Unions

..... *very much*
so.....
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c. Employees

Very much
so.....
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14. How has the partnership fared post organisational change?

...Remained very much in
fact.....
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DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Nottinghamshire Healthcare NHS Trust and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Nottinghamshire Healthcare NHS Trust. In section B please tick as many boxes as apply and detail the Nottinghamshire Healthcare NHS Trust situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☐ Union representative ☒

2. What is your formal title in your role and your organisation?

Trust Modernisation Lead / Staff Side Diversity Lead

3. Who employs you?

Nottinghamshire Healthcare NHS Trust

4. What is the union membership density within Nottinghamshire Healthcare NHS Trust?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☒ 81-90% ☐ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☒ 81-90% ☐ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making ☒

The employer/organisation actively supports trade union recruitment by providing recruitment advice to new employee induction ☒

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

☒

Are the union rights/responsibilities and role the same over all business units?

If not how does it vary?
(Free text area)

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.....

7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

.....the merger of the whole organisation from its separate component smaller organisations creating one large mental health and learning disabilities trust including forensic services. This brought together different parts of the organisation including different unions and a partnership agreement between the unions and management was formally adopted for purposes of negotiations and facilities arrangements.

.....

8. Indicate and describe the type of organisational change that Nottinghamshire Healthcare NHS Trust has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input checked="" type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input checked="" type="checkbox"/>	Outsourcing/TUPE	<input checked="" type="checkbox"/>

Free text area

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9. What effect did this organisational change have on Nottinghamshire Healthcare NHS Trust managements' attitudes towards the partnership, and how did this affect their role in the partnership?

.....changes in the seniority management team led to some initial difficulties with partnership working as well as staff anxieties across the organisation.

.....

10. What effect did this organisational change have on Nottinghamshire Healthcare NHS Trust union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

.....the partnership agreement on the union side was a strength that was maintained throughout the changes and was a support mechanism amongst the different unions represented.....

11. What were the pressure points on the employer-union partnership when undergoing organisational change?

.....pace of change

differences of opinion regarding necessity

issues of cost savings

issues of level of involvement and consultation

impacts of change on staff (sickness etc)

.....

.....

12. What difference has partnership made to the management of organisational change within Nottinghamshire Healthcare NHS Trust

Greater employee acceptance of change ☐ / ☐

Maintained good union relationships through redundancy ☐ / ☐

Free text area

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13. Overall has the partnership been of value and/or produced benefits to:

a. Nottinghamshire Healthcare NHS Trust

.....real organisational benefits through greater staff involvement and engagement in changes.

much reduced disciplinaries and grievances hence better industrial relations

.....

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.....

b. Unions

.....better and quicker results for staff better and more opportunities for informal resolutions
positive in put into policy negotiations
.....

c. Employees

.....better terms and conditions of working
more say in workplace
better informed of changes
.....

14. How has the partnership fared post organisational change?

.....organisational change is consistently on going

DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Nottinghamshire Healthcare NHS Trust and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Nottinghamshire Healthcare NHS Trust. In section B please tick as many boxes as apply and detail the Nottinghamshire Healthcare NHS Trust situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☒ Union representative ☐

2. What is your formal title in your role and your organisation?

Head of HR; Employment Relations & Diversity

3. Who employs you?

Nottinghamshire Healthcare NHS Trust

4. What is the union membership density within Nottinghamshire Healthcare NHS Trust?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
 51-60% ☐ 61-70% ☐ 71-80% ☒ 81-90% ☐ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
 51-60% ☐ 61-70% ☐ 71-80% ☒ 81-90% ☐ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making ☒

The employer/organisation actively supports trade union recruitment by providing recruitment advice at new employee induction ☒

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

Are the union rights/responsibilities and role the same over all business units? ☒

If not how does it vary?

(Free text area)

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

The forming of Nottinghamshire Healthcare NHS Trust [April 2001] formed the backdrop to the development of the Trust's very active and strong partnership relationship with its staff side organisations and also the catalyst for the forward thinking partnership agenda that dominates within the organisation to date.
.....The partnership relationship was based on a strong organisational 'partnership infrastructure' from day 1, which secured effective partnership working, involvement and staff engagement through the staff organisations in decision making at all levels within the organisation [local level, Care Group and Trust level].

8. Indicate and describe the type of organisational change that Nottinghamshire Healthcare NHS Trust has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input checked="" type="checkbox"/>	Outsourcing/TUPE	<input checked="" type="checkbox"/>

Free text area
.....The Trust has avoided the need for any compulsory redundancies to date.
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9. What effect did this organisational change have on Nottinghamshire Healthcare NHS Trust managements' attitudes towards the partnership, and how did this affect their role in the partnership?

Managers within the Trust have increasingly experienced the value of effective partnership working, especially in situations of organisational change and development. Good partnership working has reduced the need for overly formal and beaurocratic processes and has prevented undue grievances, complaints etc from staff that are involved in such change processes.
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10. What effect did this organisational change have on Nottinghamshire Healthcare NHS Trust union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

I believe that the local and full time reps are also very positive and facilitative in respect of partnership practices. Certainly the staff side reps have been instrumental in creating positive change within the Trust.

11. What were the pressure points on the employer-union partnership when undergoing organisational change?

There are often very difficult situations where organisational change occurs, where individual staff member or indeed service users/carers are unhappy with a proposed change/development and where anxieties need to be addressed and resolved sensitively. We have normally been able to address such tensions through a partnership approach. It is important to recognise that sometimes the aims of the organisation may run contrary to the desires of individuals and therefore pressure can arise.

12. What difference has partnership made to the management of organisational change within Nottinghamshire Healthcare NHS Trust

Greater employee acceptance of change ☒

Maintained good union relationships through redundancy ☐

Free text area

13. Overall has the partnership been of value and/or produced benefits to:

a) Nottinghamshire Healthcare NHS Trust

Certainly – The Trust has benefited significantly from its partnership practices and processes. Some of the key benefits have included a significant reduction in the levels of formal employment casework within the Trust [grievance, complaints etc], more effective organisational change/development processes and better decisions being made as a result of positive joint contributions.

b) Unions

A greater opportunity to influence and shape organisational decisions. Also a more effective voice in representing their membership.

c) Employees

Staff have a higher level of input, influence and involvement in decision making. Staff also benefit from more effective representation by their trade unions.

14. How has the partnership fared post organisational change?

The partnership agenda within the Trust has grown and improved since 2001.

DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Royal Mail and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Royal Mail. In section B please tick as many boxes as apply and detail the Royal Mail situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☐ Union representative ☒

2. What is your formal title in your role and your organisation?

.....Assistant National Secretary, Unite the union, CMA sector

3. Who employs you?

... Unite the union.....

4. What is the union membership density within Royal Mail?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☒ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☒ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making ☐

The employer/organisation actively supports trade union recruitment by providing recruitment access at new employee induction ☐

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

Are the union rights/responsibilities and role the same over all business units? ☒

If not how does it vary?
(Free text area)

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

.....This followed the Sawyer Report, a review by Lord Sawyer of Darlington and Ian Borkett of the TUC together with Nicholas Underhill QC. This first reported in 2001. The report followed a period of unofficial Industrial Action by the CWU. One of the recommendations from the Sawyer Report was the setting up of partnership boards across Royal Mail. This was to include all parties and accordingly embraced the CMA Sector. The tri-partite approach was to seek to progress partnership working across the whole organisation. Partnership Boards were set up at national level as well as at operational area level. These consisted of the three main parties, Royal Mail, CWU and CMA it also involved external parties. For example Baroness Prosser chaired the South London partnership board and Frances O'Grady of the TUC sat on the national partnership board.

8. Indicate and describe the type of organisational change that Royal Mail has been going through in recent times?
(Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input checked="" type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input type="checkbox"/>	Outsourcing/TUPE	<input checked="" type="checkbox"/>

Free text area

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9. What effect did this organisational change have on Royal Mail managements' attitudes towards the partnership, and how did this affect their role in the partnership?

Many managers within Royal Mail found the approach to be threatening. They believed that it undermined their right to manager. However the unions had always stated that this was not joint management and all the way through the process it was generally accepted that were consensus did not occur that management had the right to manage. Inevitably the partnership debate was in its infancy and did not, in any way, replace the normal industrial relations processes that existed. Therefore it was unlikely that any decision to be taken was going to undermine their role and responsibilities. Nevertheless, in general, management found the scenario one that undermined their status within the organisation and the need to share information was a threat to their macho culture.

10. What effect did this organisational change have on Royal Mail union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

.....Union representatives found little if any difference in the approach. It was still difficult to get information out of management and although there were many efforts, by all parties, to make positive progress when things got tough

management resorted to type as did reps. Throughout the whole experience there was rabid scepticism within the organisation and if the approach was designed to improve trust across all the players, it failed miserably.

11. What were the pressure points on the employer-union partnership when undergoing organisational change?

..... The main threat, as perceived by management and unions was the affect that this could have on the status of the players in the organisation. Management felt undermined and the union reps considered that it was all an attempt to undermine the role of the union and to and circumvent them. Of course these was some validity in the reps position and it was difficult to draw the line between collective issues and subjects that could be progressed under the partnership banner.

Many of the reps in Royal Mail had been around a long time and remembered the Industrial Democracy experimnt in the Post Office. This came out of the Donovan Commission report.

Reps were also comfortable with the existing industrial relations processes. Whilst being tortuous in application they were tried and tested and anything new was to be treated with suspicion.

12. What difference has partnership made to the management of organisational change within Royal Mail?

Greater employee acceptance of change ☐

Maintained good union relationships through redundancy ☒

Free text area

.....My union has experienced a large number of redundancies over the last few years and it is likely that these, all of which have been achieved on a voluntary basis, would have been more difficult achieve if we had not attempted the partnership approach.

It was demonstrated to us that the sharing of information and the opportunity to influence decision before they are made can be fruitful. However this was not turned into a new way of working within the organisation. Partnership is another initiative that Royal Mail has tried and moved away from because of its inability to persevere with the approach.

13. Overall has the partnership been of value and/or produced benefits to:

a. Royal Mail

.....No.....
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.....
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b. Unions

.....No.....
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.....
c. Employees

No. In fact a large number of them have probably been totally ignorant of the attempts at partnership that were tried.....

14. How has the partnership fared post organisational change?

Not relevant in the context of the answers given
above.....

DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Royal Mail and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Royal Mail. In section B please tick as many boxes as apply and detail the Royal Mail situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☐ Union representative ☒

2. What is your formal title in your role and your organisation?

Former General Secretary of Communications Management Association/ National Secretary AMICUS. Retired from these roles in July 2002 and since then I have been working on the Dignity and Respect at Work (DRAW) programme which came out of the partnership project based on Lord Tom Sawyer's Report. My current job title is Independent Chair of The DRAW National Steering Group.

3. Who employs you?

Royal Mail funds my part time role as Independent Chair of the Dignity and Respect at Work (DRAW) National Steering Group. I am truly independent and neither Royal Mail nor the Unions exert any pressure on me.

4. What is the union membership density within Royal Mail? *I do not know the current figures*

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☐ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☐ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☐

Extensive input into organisational decision making ☐

The employer/organisation actively supports trade union recruitment by providing recruitment at ☐ at new employee induction

The union is recognised for negotiation over pay ☐

The union is recognised for negotiation over pay and non pay terms and conditions ☐

The union is recognised for consultation rights over other elements ☐

Are the union rights/responsibilities and role the same over all business units? ☐

If not how does it vary?
(Free text area)

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.....

7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

...The partnership initiative came about as a result of the Lord Tom Sawyers Report into the dreadful state of industrial relations that prevailed at the time. In the early 2000s late 1990s there were many unofficial strikes and high levels of bullying/harassment and discrimination. Although some useful progress was made with the partnership initiative, which was based on a recommendation in the Sawyer Report, and this was accompanied by a prolonged period of relative calm in terms of industrial action it would be wrong to assume that partnership ever really took off. The lack of trust between the parties really undermined the partnership approach that to work effectively needs real and genuine commitment from all parties at all levels. With a business the size of Royal Mail and the history of poor industrial relations to try to change of culture is a hugely difficult challenge. With the DRAW initiative we found some common ground, a shared vision, built trust and shared ownership. These elements all need to be present for partnership to really succeed and even then it involves a lot of hard work. There are no quick fixes when it comes to changing the culture of an organisation.

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8. Indicate and describe the type of organisational change that Royal Mail has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input type="checkbox"/>	Outsourcing/TUPE	<input type="checkbox"/>

Free text area

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9. What effect did this organisational change have on Royal Mail managements' attitudes towards the partnership, and how did this affect their role in the partnership?

.....These matters were dealt with in the normal industrial relations way with negotiations and bargaining rather than in a truly partnership way.

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10. What effect did this organisational change have on Royal Mail union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

.....It made all parties revert to "type".

11. What were the pressure points on the employer-union partnership when undergoing organisational change?

.....The unions wanted a higher price than management were willing to pay for accepting change.

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12. What difference has partnership made to the management of organisational change within Royal Mail?

Greater employee acceptance of change ☐

Maintained good union relationships through redundancy ☐

Free text area

.....Neither of the above as we do not have a partnership other than in respect of the DRAW initiative.

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13. Overall has the partnership been of value and/or produced benefits to:

a. Royal Mail

Only in respect of the DRAW initiative where it has provided a real opportunity for all parties to work together for the common good both at national and local levels. However this activity is not badged with the "partnership" label.

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.....
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b. Unions

.....As above
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.....
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.....
.....

c. Employees

.....DRAW has helped make Royal Mail a better place to
work.....
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14. How has the partnership fared post organisational change?

.....It does not exist as originally envisaged
.....
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DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Royal Mail and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Royal Mail. In section B please tick as many boxes as apply and detail the Royal Mail situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☐ Union representative ☒

2. What is your formal title in your role and your organisation?

.....Midlands Divisional Representative, Communication Workers Union

3. Who employs you?

.....Royal Mail.....

4. What is the union membership density within Royal Mail?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☐ 91-100% ☒

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☐ 91-100% ☒

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making ☒

The employer/organisation actively supports trade union recruitment by providing recruitment advice to new employee induction ☒

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non-pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

Are the union rights/responsibilities and role the same over all business units? ☒

If not how does it vary?

(Free text area)

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

There was an industrial relation crisis in Royal Mail. It was eventually agreed that an independent review of IR was necessary. Lord Sawyer headed this review up. He made a number of recommendations, the principle one was that RM and the Unions (CWU & CMA) should seek to engage in a partnership form of working together.

This was very controversial for the CWU, as partnership working was viewed at the time as something Union's only did if they were very weak in a company or had very little membership density. None of these reasons applied to the CWU. Nevertheless, a number of joint working groups comprising RM Managers, CMA and CWU Reps were established. These were known as Sawyer Strands were set up to examine all aspects of this issue and other recommendations.

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8. Indicate and describe the type of organisational change that Royal Mail has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input checked="" type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input checked="" type="checkbox"/>	Outsourcing/TUPE	<input type="checkbox"/>

.....The most recent major changes have been the introduction of a single daily delivery, down from two deliveries a day in towns and city centres, the need to make efficiency savings in all parts of the business. There has also been a radical re-organisation of pay, overtime rates and allowances. The focus for the Union being on maximising basic pensionable pay and less reliance on excessive levels of overtime. This was controversial in some areas of the country.

9. What effect did this organisational change have on Royal Mail managements' attitudes towards the partnership, and how did this affect their role in the partnership?

...I believe that senior national managers genuinely believed in the idea, but this was not widely shared at grassroots level. The same could probably be said about the CWU. There is a joint lack of trust and mutual suspicion in the business and union. Both sides found it hard to really open up with each other.

Therefore a lot of the work on developing a 'partnership approach' focused on issues where the parties had a common agenda. The most obvious, and probably most successful strand being the Dignity and Respect at Work (DRAW) initiative. The main problem with focusing on the issues where all parties were in agreement, meant that the hard-edged stuff was never tackled.

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10. What effect did this organisational change have on Royal Mail union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

.....See above

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11. What were the pressure points on the employer-union partnership when undergoing organisational change?

.....*Union* critics or sceptics of any form of partnership working would use any change issues as justification for not going down this route. It may have been a cheap shot but inside the CWU it was very effective as portraying those who wanted to explore the concept of some form of partnership working as soft, and prepared to sell the members out, and those opposed the tough guys who were representing the members interests.

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12. What difference has partnership made to the management of organisational change within Royal Mail?

Greater employee acceptance of change ☐

Maintained good union relationships through redundancy ☐

...*Because the partnership initiatives have only dealt with issues where there were already common agenda's I don't believe it has had much of any impact on these type of issues. For example there is no common agenda or view on issues such as the business plan (the hard edged stuff). What has delivered on the above issues is change through agreements with the Union, and voluntary redundancy only (no compulsory) together with a good VR package.*

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13. Overall has the partnership been of value and/or produced benefits to:

a. Royal Mail

Assisted greatly on helping change the culture of bullying and harassment in the industry via the DRAW initiative,
but not much else.

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b. Unions

See above

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c. Employees

See above

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14. How has the partnership fared post organisational change?

... Sadly, I don't believe it has had any long-term positive or lasting impact apart from the DRAW initiative. In many ways the attempt has run its course, we are now engaged in a national dispute. Trust and change is at the heart of the dispute. A new initiative will be needed at some point in time.

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DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Royal Mail and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Royal Mail. In section B please tick as many boxes as apply and detail the Royal Mail situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☐ Union representative ☒

2. What is your formal title in your role and your organisation?

Territorial Counter Representative – Western Territory

3. Who employs you?

Post Office Ltd

4. What is the union membership density within Royal Mail?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☒ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☒ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making ☐

The employer/organisation actively supports trade union recruitment by providing recruitment access at new employee induction ☒

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

Are the union rights/responsibilities and role the same over all business units? ☒

If not how does it vary?

(Free text area)

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

.....Increase in
unofficial industrial action led to independent review of IR by Lord Sawyer who recommended establishing
partnership.....
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8. Indicate and describe the type of organisational change that Royal Mail has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input checked="" type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input checked="" type="checkbox"/>	Outsourcing/TUPE	<input checked="" type="checkbox"/>

Free text area
.....Major
reduction in number of employees and in POL continuing of
franchising.....
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9. What effect did this organisational change have on Royal Mail managements' attitudes towards the partnership, and how did this affect their role in the partnership?

I believe Royal Mail Board decided that partnership was not way forward to effect quick change or
progress.....
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10. What effect did this organisational change have on Royal Mail union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

At a senior level the Union changed policy and no longer wished to pursue partnership.....
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11. What were the pressure points on the employer-union partnership when undergoing organisational change?

Formal disagreements and strikes – speed of change...and no employee buy in.....
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12. What difference has partnership made to the management of organisational change within Royal Mail?

Greater employee acceptance of change ☐

Maintained good union relationships through redundancy ☐

Free text area
.....M
made very little change partly due to partnership now formally abandoned by both parties.....
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13. Overall has the partnership been of value and/or produced benefits to:

a. Royal Mail

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No.....
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b. Unions

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No.....
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c. Employees

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No.....
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14. How has the partnership fared post organisational change?

.....No longer
exists.....
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DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer –union partnership within Royal Mail and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Royal Mail. In section B please tick as many boxes as apply and detail the Royal Mail situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☐ Union representative ☒

2. What is your formal title in your role and your organisation?

.....Senior Manager Representative on the National Sector Committee UNITE CMA
.....

3. Who employs you?

Royal Mail
.....

4. What is the union membership density within Royal Mail?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☒ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☒ 81-90% ☐ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☐

Extensive input into organisational decision making ☐

The employer/organisation actively supports trade union recruitment by providing recruitment access at new employee induction ☐

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

Are the union rights/responsibilities and role the same over all business units? ☐

If not how does it vary?

(Free text area) In business that are operational in nature and have strong membership density, then the union is strong, In other business units, such as Administration, Finance and HR then the union is less influential.

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

.....The union made a good business case to become involved in the partnership and demonstrated that working together was better for all stakeholders, union, employees, customers and the business itself.

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8. Indicate and describe the type of organisational change that Royal Mail has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies ☒ Merger & acquisition ☒

Introduction of radically different work practices ☒ Outsourcing/TUPE ☒

Free text area

.....Massive organisational change including all of the above.Over the last five years we have lost over 40,000 front line jobs and some 3,000 managerial positions. The scale of these changes is unprecedented in British industrial history. Nothing has been left the same, every single aspect of how the Post Office used to operate has been changed in some way or another.

9. What effect did this organisational change have on Royal Mail managements' attitudes towards the partnership, and how did this affect their role in the partnership?

.....It depends on which tier of management you are talking about in any particular circumstance. But, if we were to speak about Board level attitudes,then it appears to be one of We are in charge of this change, we have the backing of the Government, we know what needs to be done and you don't, we will continue to consult with you in partnership, but in the end we are the bosses and we intend to make the decisions based on what we think is best for you. Plus, they must have an agenda to work to that we are not privy to. Otherwise we could work in real partnership to meet the challenges ahead.

.....

10. What effect did this organisational change have on Royal Mail union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

...I suppose that it is inevitable that most people will revert to parochial self interests when faced with massive organisational changes and under the circumstances most of them have lost faith in Royal Mail managements commitment to the sense of partnership working. However, a majority of the representatives still believe that once the

message gets through to the political masters, who are pulling the strings on this, then they also will see that proper partnership working is the best way forwards. Time and the timing of General elections may very well tell, who knows?

11. What were the pressure points on the employer-union partnership when undergoing organisational change?

... The main pressure points are working to unrealistic timescales and target dates. Undoubtedly and probably above all other issues, the opening up of the mails market to competition and regulation have been the main influencing factors in all of this as Royal Mail has not been able to get itself into a position to fight off the competition effectively and poor planning and little or no investment in the infrastructure of the business over the past ten years is now taking its toll.

12. What difference has partnership made to the management of organisational change within Royal Mail?

Greater employee acceptance of change ☐

Maintained good union relationships through redundancy ☐

Free text area

..... Yes, despite everything else, partnership working enables the unions to gain a better commercial awareness of the businesses operating position and the rationale for decision making is better communicated, so common sense should tell everybody that there is an element of requirement to maintaining it as best we can. Partnership working also enables the unions to question the rationale and to ensure that all options are considered before resorting to shedding jobs to make the numbers. Management should Understand that partnership working is brilliant at testing out their new ideas in an environment where challenging assumptions will be practically based and if the idea is sound and robust, then it will stand up in that forum and have a much better chance of succeeding when deployed if it is not resisted or rubbished by the unions. Makes sense to me, don't know why they are so reluctant to use this approach and keep on pretending that they do, must be some sort of weird science they are practicing?
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13. Overall has the partnership been of value and/or produced benefits to:

a. Royal Mail

Yes, it should have for all the reasons outlined above.
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b. Unions

Yes, it allows us to test their rationale and for us to become part of the decision making process, plus we have to consider how new ideas will benefit the business and impact upon our membership. Partnership working benefits

all if it is entered into in the right spirit with openness and honesty. But, you have to understand that in the real world, everybody has an agenda. And this is what makes it a lot more complicated than what you would envisage.

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c. Employees

.....It should greatly benefit them as they would be able to reap the rewards of sound business and commercial decisions being made with them in mind at all times. A happy and contented workforce is a productive and stable workforce

.....

14. How has the partnership fared post organisational change?

...It changes in line with organisational change. Plus the names in the frame change just as often so it is mercurial in character, but overall I would say that it is maturing, but has a long way yet to go.....

.....

.....

DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer --union partnership within Royal Mail and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Royal Mail. In section B please tick as many boxes as apply and detail the Royal Mail situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☒ Union representative ☐

2. What is your formal title in your role and your organisation?

Great Place to Work Programme Leader (But during the time of partnership working my role was National Partnership Manager)

3. Who employs you?

Royal Mail Group

4. What is the union membership density within Royal Mail?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☒ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☐ 81-90% ☒ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making ☒

The employer/organisation actively supports trade union recruitment by providing recruitment access at new employee induction ☒

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non-pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

Are the union rights/responsibilities and role the same over all business units? ☒

If not how does it vary?

(Free text area)

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7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

..... In May 2001 the industrial relations climate in Royal Mail was dire. There had been a significant increase in unofficial industrial action, which had resulted in a breakdown in relations and a complete lack of trust and respect between management and union members at all levels of the organisation. Against this background, Royal Mail and the CWU jointly requested that an independent review be carried out to assess the unstable industrial relations situation and recommend changes for the future. This resulted in the Sawyer Report, the review was conducted by Lord Sawyer of Darlington and Ian Borkett of the TUC together with Nicholas Underhill QC. One of the main recommendations from the Sawyer Report was the setting up of partnership boards across Royal Mail.

8. Indicate and describe the type of organisational change that Royal Mail has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input checked="" type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input checked="" type="checkbox"/>	Outsourcing/TUPE	<input checked="" type="checkbox"/>

Free text area

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9. What effect did this organisational change have on Royal Mail managements' attitudes towards the partnership, and how did this affect their role in the partnership?

...There were mixed reactions – whilst some managers were willing to embrace the approach many saw it as a direct challenge on their 'right to manage' and as such reacted negatively. There was also a perception that 'partnership' was the soft option – usefully for dealing with 'warm' 'people' issues but not appropriate for dealing with 'tough' management issues such as cost and quality and changes to the operation. Many suggested that partnership was just about talking and talking slowed things down – in periods of major change we don't have time to talk. I guess in essence, the preferred culture was command and control – partnership working challenged this and as such without a real desire to change behaviours it was doomed to fail.....

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10. What effect did this organisational change have on Royal Mail union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

...Again mixed. Of the two unions CMA Amicus really tried to embrace the opportunity, whereas the CWU typically saw it as a means to usurp their role and as such a real threat. Key to this was the decision taken that partnership would not impinge on any aspects over which the union had negotiation rights – any evidence that partnership boards were straying into this territory was quickly challenged. Therefore groups could talk but they had no muscle, no bite and against a background of mistrust by all parties they therefore were deemed ineffective.....

11. What were the pressure points on the employer-union partnership when undergoing organisational change?

Lack of trust on all sides – wanting to run partnership in parallel to tradition collective bargaining rights, the pace of change being too quick. The boards were unable to grow and develop, to take risks, to make mistakes and rebuild. As external pressures hit – both management and unions retreated to the comfort of status quo.

12. What difference has partnership made to the management of organisational change within Royal Mail?

Greater employee acceptance of change

No

Maintained good union relationships through redundancy

Yes

Free text area

..... The principles behind partnership working still hold true. It did encourage both sides to share information and ideas for change. Whilst the approach floundered I believe it did give some foundations for improved relationships, which have helped in recent redundancy discussions.

13. Overall has the partnership been of value and/or produced benefits to:

a. Royal Mail

.....Minimal – just not given enough time.....

.....
.....
b. Unions

.....*As above – probably more so for the CMA .Amicus -*

c. Employees

.....*Not really – again they are the victims of poor management /union behaviours – hence current poor IR.*
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14. How has the partnership fared post organisational change?

.....*N/A.*
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DO PARTNERSHIPS INEVITABLY DETERIORATE UNDER PRESSURE OF ORGANISATIONAL CHANGE?

This section of the questionnaire is designed to define the strength of the employer --union partnership within Royal Mail and how it has evolved over the last 7 years. In section A please answer the question by ticking the box that most closely reflects the situation in Royal Mail. In section B please tick as many boxes as apply and detail the Royal Mail situation in the free text areas.

SECTION A

1. What is your role in the employer-union partnership?

Management ☒ Union representative ☐

2. What is your formal title in your role and your organisation?

.....Industrial Relations Royal Mail
Letters.....

3. Who employs you?

Royal Mail
.....

4. What is the union membership density within Royal Mail?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☒ 71-80% ☐ 81-90% ☐ 91-100% ☐

5. What has been the average union membership density over the past 7 years?

NIL-10% ☐ 11-20% ☐ 21-30% ☐ 31-40% ☐ 41-50% ☐
51-60% ☐ 61-70% ☐ 71-80% ☒ 81-90% ☐ 91-100% ☐

SECTION B

6. Please tick the following responsibilities/role/rights that apply to the union(s) in your organisation.

Union representatives have strong, legitimate positions in the organisation ☒

Extensive input into organisational decision making Only in some places. In others we spend too much time opposing

The employer/organisation actively supports trade union recruitment by providing recruitment ac ☒ at new employee induction

The union is recognised for negotiation over pay ☒

The union is recognised for negotiation over pay and non pay terms and conditions ☒

The union is recognised for consultation rights over other elements ☒

Are the union rights/responsibilities and role the same over all business units? No. Perhaps they should be in theory but they are very different in practice.

If not how does it vary?
(Free text area)

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.....

7. What were the circumstances surrounding the creation of your employer-union partnership? And how was this approached?

We have a formal recognition and procedural agreement with the union. It covers how we work together as partners to create positive working relationships.
This agreement itself came about as the result of collective bargaining with the union.....

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8. Indicate and describe the type of organisational change that Royal Mail has been going through in recent times? (Please indicate scale and repercussions of the change undergone in the free text area)

Redundancies	<input checked="" type="checkbox"/>	Merger & acquisition	<input type="checkbox"/>
Introduction of radically different work practices	<input checked="" type="checkbox"/>	Outsourcing/TUPE	<input type="checkbox"/>

Free text area

..... We have completed the first phase of our transformation. That was done with union involvement. However we have a lot more to do, particularly as we now have access to investment that will enable us to modernise the way we work and serve our customers more effectively and efficiently.

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9. What effect did this organisational change have on Royal Mail managements' attitudes towards the partnership, and how did this affect their role in the partnership?

It made both parties aware that the current recognition agreement is out of date and needs to be streamlined. We get bogged down in issues that ought to be dealt with via local consultation and this introduces delays and arguments that miss the point of what we need to do.

The focus needs to be much more clearly on how we do things successfully, rather than whether or not we need do anything.

It also highlighted the need for us to get better at proper consultation. We should be more confident in listening to the views of our representatives and be prepared to take them onto account.

.....It is important that we distinguish between what is the genuinely strategic and what is a matter for local debate on how a change is made.

We want to get to a point where we can show that change is made more effectively with the union involved than it would be otherwise. The number of old collective agreements and odd practices make that difficult for both parties.

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10. What effect did this organisational change have on Royal Mail union representatives' attitudes towards the partnership, and how did this affect their role in the partnership?

...There is a tendency amongst some activists to feel that change can only happen by permission of the union. And if the union does not accept the fundamentals of the changes, it seeks the right to oppose the very fact that it must happen.

When we jointly review how (not whether) change is introduced we can often get better results as a result of union involvement. But too often we miss the point and get skirmishes on whether we need to improve efficiency and effectiveness. The procedural rows can obscure

The union is a stakeholder in the future success of our company. That gives it a role and we need to get better at helping them to play it more effectively. Our people remain loyal to their union (even when it does some odd things) and we want to find ways of channelling that into pressure for effective change rather than protecting status quo.....
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11. What were the pressure points on the employer-union partnership when undergoing organisational change?

Having agreed national frameworks for change the local parties were not always driven by the need to make it happen quickly and effectively.
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12. What difference has partnership made to the management of organisational change within Royal Mail?

Greater employee acceptance of change ☐

Maintained good union relationships through redundancy ☐

Free text area

We still have too many who feel further change is discretionary and something that can be rejected if the price is not right. The mindset is that we can walk away from it if the change is not bought at an acceptable fee.....
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13. Overall has the partnership been of value and/or produced benefits to:

a. Royal Mail

.....Some benefits to date, some disbenefits, for all parties involved.
.....It has enabled us to achieve massive improvements in the reliability of our service and protect our financial viability. That has meant no compulsory redundancies and real pay increases since 2003.....
.....
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b. Unions

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c. Employees

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14. How has the partnership fared post organisational change?

We are not post organisational change. We have done part one but there is a lot more to come.

Some on both sides might prefer that not to be the case and have not yet become fully committed to making change happen as quickly and effectively as we can.

We need to build a lot more confidence and capability.

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